

Membership Approval and Unit Allocation Board Policy

Passed by the Board of
Directors on: February 8, 2021

On: March 15, 2021

Board of directors passed a motion to “confirm the MAUA By-law draft at the board level”, meaning that the text of this policy is also to be used as draft text for a by-law to be brought forward to members for review and vote at a future date.

On: May 10, 2021

Board of directors passed a motion confirming that they would “give staff the opportunity to begin implementing the MAUA as policy, and to share their challenges and/or feedback over the next few months. The month before the member vote the board will revisit this feedback and make any revisions before presenting it to the membership.”

Article 1:	About This Board Policy	
1.1	Special Meanings	4
1.2	Aims of the Process	5
1.3	Non Discrimination	5
1.4	Membership Criteria	5
1.5	No Appeal to the Members	6
Article 2:	Applying to the Co-op	6
2.1	Application Requirements	6
2.2	Confidentiality	6
2.3	Membership Process	7
Article 3:	Application Refusals and Appeals	7
3.1	Purpose of this Article	7
3.2	Refusals	7
3.3	Notify the Applicant	7
3.4	Appeals	7
3.5	Record of Refusals	8
3.6	Re-applying after Refusal	8
Article 4:	Waiting Lists	8
4.1	Two Waiting Lists	8
4.2	Priority	9
Article 5:	Internal Waiting List	10
5.1	Member's Right to Apply	10
5.2	Minimum Period of Residence	10
5.3	Priority on the Internal Waiting List	11
5.4	Exceptions to Normal Priority	11
5.5	Transfers Required under the Co-op's Occupancy By-law	12
5.6	Agreement to Maintain CMHC Subsidy Levels	12
5.7	Relocation of Part of Household	12
5.8	Arrears	13
5.9	Serious Damage	13
5.10	No Trading of Units	13
5.11	Role of Staff in Making Offers	13
5.12	Priority if Member is Unavailable	14
5.13	Effect of Refusals	14
5.14	Notification of Acceptance by Applicant	14
Article 6:	External Waiting List	15

6.1	Maintaining the External Waiting List	15
6.2	Offer of Units to Applicants on the External Waiting List	15
6.3	Withdrawal of Membership Approval	15
6.4	Priority if Applicant is Unavailable	16
6.5	Priority if Offer is Refused	16
6.6	Notification of Acceptance by Applicant	16
6.7	Deposits and Charges	17
Article 7:	Appeal of Waiting List Decisions	17
7.1	Right to Appeal	17
7.2	No Appeals to the Members	17
Article 8:	No Liability	17
8.1	No Liability	17
8.2	Matters not addressed in this Board Policy	18
Schedule A: Sample Application Form		19
Schedule B: Membership Approval Process		20
Schedule C: Membership Interview Form (1)		22
Schedule C: Membership Interview Form (2)		23
Schedule D: Internal Transfer Application [SEE ALSO attached versions, “Internal Membership Application,” and “Request for Internal Unit Transfer”]		24

Article 1: *About This Board Policy*

This Board Policy deals with membership approvals, unit allocations and waiting lists. The following policy is repealed when this Policy becomes effective:

- i) the *Fred Dowling Occupancy and Waiting List Policy, Membership Criteria, and Forms To Be Used for Internal Move Requests* (1988)

Some related provisions appear in the Co-op's Occupancy By-law and the Co-op's Organizational By-law. In addition, certain laws affect admission to the co-op. The following will govern in order of priority:

- ii) the *Co-operative Corporations Act* and the *Ontario Human Rights Code* and other government requirements
- iii) the Co-op's Occupancy By-law
- iv) the Co-op's Organizational By-law, and
- v) this Board Policy
- vi) the other by-laws of the co-op, unless the by-laws state differently.

1.1 Special Meanings

Certain words have special meanings when used in this Board Policy.

(a) Applicable Occupancy Standards

Applicable Occupancy Standards means the occupancy standards, if any, set out in the Co-op's Occupancy By-law.

(b) Business days

Business days refers to Monday through to Friday and does not include Saturday or Sunday or any public holidays.

(c) Government Requirements

"Government requirements" means the laws, regulations or agreements with government bodies that apply to the co-op.

(d) Manager

In this Board Policy “manager” refers to the senior staff person. That person could have a different job title. Also, in some cases the board of directors or manager may authorize other staff members to perform some of the manager’s duties mentioned in this Board Policy.

(e) **Overhoused**

“Overhoused” is the term used to describe a household where there are fewer occupants than permitted under the minimum applicable occupancy standards as stated in the Co-op’s Occupancy By-Law

(f) **Underhoused**

“Underhoused” is the term used to describe a household where there are more occupants than permitted under local municipal by-law standards.

1.2 Aims of the Process

The aims of the application and membership approval process are to make sure that:

- Applications are evaluated fairly against the co-op’s membership criteria
- Applicants have enough information to decide whether they are
- interested in living in the co-op
- The co-op has enough information to evaluate the application
- The process minimizes loss of revenue caused by vacancies

1.3 Non Discrimination

In assessing applications for membership the co-op will comply with the *Ontario Human Rights Code* and will not discriminate against anyone in a way that is prohibited by the *Ontario Human Rights Code*. The co-op will assess applications on the basis of the Co-op Principle of Open and Voluntary Membership.

1.4 Membership Criteria

Applicants for membership in the co-op must meet the following standards:

- At least one member of the household is aged 16 years or older
- The household’s credit and rental history together with other financial information does not give the co-op reasonable grounds to believe the household will fail to pay the housing charge

- The household meets the applicable Occupancy standards
- Applicants have:
 - i. A positive attitude towards living in a community with people from different social, economic and cultural backgrounds and have a commitment to treating other members with respect
 - ii. An interest in contributing to the operation and life of the co-op
 - iii. Are prepared to accept their responsibilities as co-op members
 - iv. A willingness to maintain the unit in good repair

The co-op will apply these standards equally to all applicants and in accordance with the *Human Rights Code*.

1.5 No Appeal to the Members

Decisions of the board under this Board Policy cannot be appealed to the members.

Article 2: Applying to the Co-op

2.1 Application Requirements

All applicants must apply to the co-op on the application form that the co-op provides. Schedule A of this Board Policy provides an application form. Application forms must be complete and signed by all adult household members.

All members of the applicant's household who are 16 years of age or older and intend to live in the co-op must apply for membership or long-term guest status. If they do not, the co-op will not consider the application. All applicants must go through the co-op's membership process.

All applicants for membership must provide proof of income in a form determined by the co-op.

2.2 Confidentiality

Each applicant must sign a form that gives permission for the co-op to conduct a credit check and a landlord check, for purposes of determining rental history only. The co-op will use the information obtained in connection with the application and with the applicant's membership, if accepted. ***(This consent is in the attached application form)***

2.3 Membership Process

The board may adopt procedures for dealing with member applications. Until the board decides otherwise, the procedures will be as stated in Schedule B. The procedures shall conform to this Board Policy.

Article 3: Application Refusals and Appeals

3.1 Purpose of this Article

The co-op will consider all applications seriously and will not refuse applications without careful consideration. This article sets out the rules and the process for refusal of applicants.

3.2 Refusals

The reasons to refuse an applicant must conform to the criteria stated in Article 1.4 of this Board Policy.

3.3 Notify the Applicant

When the board decides to refuse an applicant, the co-op will notify the applicant in writing within **10 business days** of the date of the board meeting. The letter will state the reasons for the refusal and inform the applicant that they are entitled to request an appeal of the board's decision.

3.4 Appeals

Applicants who have been refused can request an appeal of the board's decision. The request must be in writing and must be received at the co-op office within **20 business days** after the letter refusing the applicant was given to the applicant.

The board can decide to deny the request or offer the applicant a second interview with two different interviewers. The interviewers will forward their recommendations to the

board for approval. The board can make any decision that could have been made originally. The decision of the board will be final. The co-op will notify the applicant in writing of the board's decision within **10 business days** of the board meeting at which the decision was made.

The appeal process does not affect the co-op's ability to fill a unit. If the applicant's appeal is successful, the applicant's place on the waiting list will be according to the original date of the application

3.5 Record of Refusals

The co-op will maintain a written record of refusals for a period of at least seven years after the day the letter was given to the household. The written record will include:

- The board's decision to refuse
- Copies of all correspondence that were given to the applicant
- Any materials received from the applicant
- The information used by the co-op to make its decision

3.6 Re-applying after Refusal

Applicants that have been refused membership can submit a new application in the future. For example, the applicants may feel that their circumstances have changed and they now meet the co-op's membership criteria.

The board may decide not to consider the application if they feel that the circumstances have not changed.

Article 4: Waiting Lists

4.1 Two Waiting Lists

There are two waiting lists in the co-op:

- The Internal Waiting List
- The External Waiting List

The Internal Waiting List is made up of people who live in the co-op who

- o required to transfer under the co-op's By-laws or any Government Requirements of a rent-geared-to-income program
- o A household who has been given priority status and has requested a transfer
- o Want or need to move to a different unit

The External Waiting List is made up of households who do not live in the co-op but who have been accepted for membership.

4.2 Priority

Subject to Article 5.6 Adjustment to Maintain CMHC Subsidy Levels, the Internal Waiting List normally has priority over the External Waiting List. When a unit becomes vacant or the co-op learns that a unit is going to become vacant, the co-op will offer the unit first to a qualified member on the internal list who has indicated an interest in a unit that size.

The normal priority for the internal waiting list is set out in Article 5.3 Priority on the Internal Waiting List. Exceptions to the normal priority are set out in Article 5.4 Exceptions to the Normal Priority.

If there is no internal waiting list, or, if no household on the internal waiting list qualifies for the unit, the unit will be offered to a qualified household on the external waiting list. The priority for the external waiting list is set out in Article 6.2 Priority in Allocating Units. The exception to the normal priority on the external waiting list is set out in Article 5.6 Adjustment to Maintain CMHC Subsidy Levels.

Articles 5 and 6 of this Board Policy describe how the Internal and External Waiting Lists are set up and used by the Co-op.

Article 5: Internal Waiting List

5.1 Member's Right to Apply

Subject to Article 5.2, members may apply to transfer to any size or type of unit for which they qualify (or will qualify at the time of transfer). All households must meet any applicable occupancy standards to accept the offer.

If members who desire to expand their household with external individuals decide to apply for a larger unit, the external individuals may go through the membership acceptance process to facilitate future allocation. This process will not allow the external individual a place on the external or internal waiting list as an individual.

Members may specify that they only wish to transfer to a particular area of the co-op, a particular type of unit or a particular unit or units.

All requests to transfer to another unit in the co-op must be submitted to the co-op office using a form provided by the co-op. The co-op may use the form attached to this Board Policy as Schedule D Internal Transfer Form.

5.2 Minimum Period of Residence

- (a) Except where the internal transfer is required under the co-op's Occupancy By-law, or where the household has been given priority status and has requested a transfer, applicants for internal transfer must have been resident as members in a unit in the co-op for a minimum of two years immediately prior to submitting an application to transfer (this includes adult children of the household 16 years or older, who have applied and been accepted as a member). Following an internal transfer, members must have been resident in that unit for a minimum of two years immediately prior to applying to transfer to another unit.
- (b) The board may waive the residency time requirements set out in (a) of this section for any of the following reasons:
 - The number of persons in the member's household results in them being underhoused as per definition outlined in Article 1.1(f) ; or
 - The member's household size has changed and as a result of the change, the household qualifies for a size of unit for which it was not previously eligible; or

- The household needs to move to a less expensive unit because of an unexpected change in financial circumstances; or
 - Any other special circumstances that are recognized by the board
- (c) The circumstances in 5.2 (b) allows a household to be placed on the internal waiting list as stated in 5.3. There is no priority granted; only the waiving of a minimum time of residency requirement.
- (d) A person who moved into the co-op to join a member already resident may not apply to transfer independently of that member for a period of three years after becoming a member. However, they may be eligible under (b) of this section provided that there is a documented change of circumstance that is approved by the board.

5.3 Priority on the Internal Waiting List

The normal priority for determining an applicant's place on the internal waiting list will be the later of:

- The date that a completed application was received by the co-op and
- The earliest date on which the member is first permitted to make an application to transfer under Article 5.2 Minimum period of residence.
- The date on which the member household became overhoused (if applicable).

Subject to Article 5.4 Exceptions to normal priority and Article 5.6 Agreement to maintain CMHC subsidy levels, for members requesting an internal transfer that is not required under the Occupancy By-law, their priority will be lower than households described in Articles 5.4 and 5.5 of this Board Policy.

5.4 Exceptions to Normal Priority

The co-op may alter members' normal priority on the internal waiting list and give priority to households with a later application as follows:

- Any household which is entitled to be offered a unit under the provisions of the Occupancy By-law which deal with fire or other damage, or sale of the co-op. Priority among such households will be in the order in which they first became entitled to be offered a unit.
- Any household who has requested a transfer which is required under *the Human Rights Code*.

- The co-op has determined that there is abuse by another member of the household or immigration sponsor.

5.5 Transfers Required under the Co-op's Occupancy By-law

For households that have to make a required transfer under the co-op's Occupancy By-law, the rules are set out in the Occupancy By-law.

This includes any household subject to the government requirements of a rent-geared-to-income program.

5.6 Agreement to Maintain CMHC Subsidy Levels

The Co-op's Agreement with the Canada Mortgage and Housing Corporation (CMHC) requires that the co-op provide subsidies up to ____% of the units. If a unit becomes available and the number of households in the co-op receiving subsidy is below the minimum number required in the co-op's Agreement with CMHC, the board may have to give applicants on the external waiting list subsidy priority over households on the internal waiting list in order to comply with CMHC's requirements.

5.7 Relocation of Part of Household

If one or more, but not all residents who live together in a unit wish to apply to the internal waiting list in order to transfer to a separate unit or if one or more members of an existing household wish to apply to the internal transfer list in order to join another existing household in the co-op, they may do so provided that:

- at least one of the persons remaining in the original unit is a member of the co-op and at least one of the persons moving to the new unit is a member of the co-op;
- current member(s) of a household who wish to join another household must provide proof of residency in the current unit
- at least one member remaining in the old unit and at least one member moving to the new unit have resided in the old unit for the minimum period of residency set out in Article 5.2 Minimum period of residence;
- the household is not in arrears, or, if the household is in arrears, the household complies with Article 5.8 Arrears;

- the size of the household remaining in the old unit and the size of the household moving to the new unit will at the time of the transfer, meet the applicable occupancy standards;
- any new residents in a household that are 16 years of age or older are accepted for membership or given guest status;
- the board is satisfied that the household remaining in the old unit and the household moving to the new unit will meet the obligations to pay the housing charges for the unit and at the time the housing charges are due;

5.8 Arrears

A household on the internal waiting list will not be eligible to be allocated a unit that becomes available if the household is in arrears, with the exception of:

- a rent-geared-to-income household that is required to move due to government requirements
- a household that wishes to transfer and has signed a Performance Agreement and is meeting the terms of the Performance Agreement.

5.9 Serious Damage

Despite anything in the co-op's By-laws, if the board determines that a household is required to move because of fire or other serious damage to their unit, or contamination of their unit or any other reasons that require the unit to be vacant, the board can offer any vacant unit to that household. When the household's original unit is repaired, the household can move back to that unit. The board can decide to give the household the new unit.

5.10 No Trading of Units

No trading of units directly between or among members will be permitted.

5.11 Role of Staff in Making Offers

- (a) Co-op staff is authorized to make offers to households that are on the internal waiting list.
- (b) Co-op staff will keep the board up to date on information they may have regarding potential move-outs and internal moves. This is to permit offers to be made quickly.

5.12 Priority if Member is Unavailable

If the co-op is unable to contact the member with priority on the internal waiting list within three business days, the unit will be offered to the next eligible member on the internal waiting list. The original member will retain their position on the internal waiting list but the household will be considered to have refused the unit. The co-op will maintain written records of the contacts made with each household including date and time of contact.

5.13 Effect of Refusals

The effect of refusals for households on the internal waiting list is as follows:

- Households that are not required to move that have requested a transfer may refuse up to two units that have been offered and retain their position on the internal waiting list. If they refuse three units that meet the criteria, they will be removed from the internal waiting list.
- Households that have requested a transfer and been given priority status as defined in Article 5.4, may refuse up to two units that have been offered and retain their priority position on the internal waiting list. If they refuse three units that meet the criteria, they will be removed from the special priority status list. These households can apply to be placed on the internal waiting list with normal priority and the priority for their application will be based on the date their application for normal priority was received.
- For households that are required to move under the co-op's Occupancy By-law because they don't meet the occupancy standards, rules about refusals are in the Occupancy By-law.

5.14 Notification of Acceptance by Applicant

- (a) For all households on the internal waiting list that have been offered a unit for which they are eligible, members must notify the co-op in writing (email is acceptable) within 48 hours whether they wish to accept the unit. If they fail to do so, they will be considered to have refused the unit.
- (b) Once a member on the internal waiting list has accepted a unit, the member must vacate their unit and move into the new unit on the date specified when the unit

was offered. Acceptance of the unit may not be withdrawn without the consent of the board. Members of the household cannot appeal the board's decision.

Article 6: External Waiting List

6.1 Maintaining the External Waiting List

- (a) The external waiting list will comprise applicants who have completed the co-op application form and been accepted for membership.
- (b) The record date for determining an applicant's place on the co-op's external waiting list will be the date when a completed application is received from the applicant.

6.2 Offer of Units to Applicants on the External Waiting List

- (a) Co-op staff will be authorized to make offers to households that are on the external waiting list.
- (b) A unit will be considered available to an applicant on the external waiting list if no member who has requested an internal transfer is eligible or no such member has accepted the unit.
- (c) When a unit becomes available on the external waiting list, it will be offered to the first household on the external waiting list provided that the household:
 - has completed the co-op's membership process (Schedule B);
 - has been accepted for membership;
 - is eligible for that size and type of unit, and
 - the applicant has indicated they want the unit
- (d) If a household on the external waiting list accepts a unit that has been offered to them, they will not be required to take occupancy and commence payment of the housing charges until the first day of the third month following the offer. If the unit is vacant earlier, the household must make all reasonable efforts to move in and commence paying the housing charges earlier, if it can be done without financial loss to them.

6.3 Withdrawal of Membership Approval

Where new information about an approved applicant comes to the attention of the co-op prior to the offer of a unit, the co-op may make any appropriate change to its waiting list or (if it is determined that the household no longer meets the membership criteria outlined in Article 1.4) may withdraw its approval of the application for membership without liability. If approval of the application is withdrawn, the application will be treated as if originally refused and the applicant will be entitled to request an appeal as described in Article 3.4 of this Board Policy.

6.4 Priority if Applicant is Unavailable

If the co-op is unable to contact the first household on the external waiting list within two business days, the unit will be offered to the next eligible household. The original household will retain its priority on the waiting list. In order to avoid vacancy losses, the co-op can contact several households (in order of priority) within the time frame. The co-op will maintain written records of the contacts made with each household including date and time of contact.

6.5 Priority if Offer is Refused

- (a) A household on the external waiting list may refuse a unit because the date of occupancy is less than the 60 days from the date the unit is offered without losing priority on the waiting list.
- (b) A household on the external waiting list may refuse two units that have been offered and still retain their priority on the waiting list. Subject to 6.6 (a) of this section, if the household refuses a third unit, the household will be deleted from the external waiting list.

6.6 Notification of Acceptance by Applicant

- (a) A household offered a unit will be given two business days to decide whether to accept the unit and sign the Occupancy Agreement.
- (b) If the household does not respond within two business days, inform the co-op office that it accepts the unit and signs the Occupancy Agreement, it will be considered to have refused the unit.

- (c) Once an applicant has accepted a unit under this Article, the applicant may not withdraw their acceptance without the consent of the board. The board will not be obligated to permit the withdrawal of an acceptance and the decision of the board in this regard is final and will not be subject to an appeal.

6.7 Deposits and Charges

- (a) The co-op's Occupancy By-law sets out the charges including a member deposit that are required from members.
- (b) The applicant must pay the monthly housing charge beginning on the date specified in the Occupancy Agreement or on the date the member gets the keys to the unit, whichever is earlier.

Article 7: Appeal of Waiting List Decisions

7.1 Right to Appeal

All members and applicants can request an appeal of decisions regarding their priority on the waiting lists, acceptance of a unit or any other decision regarding the waiting lists. The appeal will be conducted by the board.

7.2 No Appeals to the Members

Decisions of the board under this Board Policy cannot be appealed to the members.

Article 8: No Liability

8.1 No Liability

- (a) Anything in the co-op's By-laws and Policies, or any commitment made by anyone that is not authorized by the board will not create any liability for the co-op. The co-op will not be liable to anyone for:
 - any error or omission, or mistake concerning the waiting lists
 - the allocation of units

· the failure to allocate units

- (b) The provisions of the co-op By-laws and Policies are for the benefit of the co-op and its members. They do not create any rights in favour of non-members. Anyone who is accepted for membership will have no right to make any claim respecting any breach of this Board Policy or any other co-op By-laws or Policies.
- (c) The co-op will in no case have any liability if a unit is not available for occupancy on a date notified or agreed to with anyone because of failure of the prior occupant to vacate or need for repairs or maintenance work.

8.2 Matters not addressed in this Board Policy

The board will decide anything relating to membership approval and waiting lists not set out in this Board Policy or the co-op's other By-laws and Policies.

CERTIFIED to be a Board Policy, passed by the board of directors at a meeting held on the 8 day of February, 2021.

_____c/s
Secretary

Schedule A: Sample Application Form

FRED DOWLING CO-OPERATIVE INC.

MEMBERSHIP APPLICATION

Unit Size Requested	Bachelor	One Bedroom	Two Bedroom
	Two Bedroom	Two Bedroom	

Household Composition & Contact Information

Reminder: proof of residency status and photo ID are required for each applicant.

Applicant(s)

1. Name

Phone #s Home _____ Cell _____ Work _____

Email address

2. Name

Phone #s Home _____ Cell _____ Work _____

Email address

Children & others

1. Name _____ Date of birth _____ Relationship _____

2. Name _____ Date of birth _____ Relationship _____

Do any members of your household have any health problems that affect your housing needs?

Yes No If yes, please explain:

Do you have any pets? Yes No If yes, please describe

Do you own a vehicle? Yes No If yes, number of parking spots required

If yes, please describe Make _____ Model _____ Year:

Colour _____ License plate #

The following information is required to complete a landlord history check.

Current Address

From _____ to _____

Monthly rent _____

Monthly utility cost (if additional) _____

Previous Address

From _____ to _____

Monthly rent _____

Monthly utility cost (if additional) _____

Landlord information

Name _____

Address _____

Phone number _____

Email _____

Landlord information

Name _____

Address _____

Phone number _____

Email _____

Employment & Financial History

Reminder: two consecutive months of current proof of income must be submitted for each applicant.

Applicant #1

Income Source Employment Self Employed Social Assistance

Pension

Occupation _____ Employer

Address _____ Phone #

Start date _____ Gross annual earnings/income

Applicant #2

Income Source Employment Self Employed Social Assistance

Pension

Occupation _____ Employer

Address _____ Phone #

Start date _____ Gross annual earnings/income

We will be conducting a credit check as part of this application. Your social insurance numbers are requested but not required.

Applicant #1 _____ Date of birth _____ SIN

Applicant #2 _____ Date of birth _____ SIN

Community Involvement & Participation

Each member is required to contribute to the community. Attendance at members' meetings is the minimum requirement and members are required to maintain their grounds and walkways. You can also participate by serving on a committee or assisting with projects and events.

1. Tell us about your experience with any co-operatives and volunteer or community activities.

2. Have you lived in a co-op before? Yes No If yes, which one?

What committees or activities were you involved with?

When did you leave the co-op and why?

3. Do you know anyone who lives at our Co-op? If yes, who?

4. Why do you want to live in a co-operative?

5. How do you see yourself participating at the Co-op?

- “ Board of Directors
- “ Finance Committee
- “ Membership Committee
- “ Social Committee
- “ CHFT & CHF Canada Delegate
- “ Delivering notices

The above are just some examples. What other skills, interest or work would you be able to contribute to the Co-op?

Declaration & Information Release

I/we have read and understand the complete information package and declare that all of the information submitted is complete.

I/we wish to apply for membership and housing at Fred Dowling Co-operative.

I/we understand that only members of Fred Dowling Co-operative Inc. and their registered guests may occupy a unit and that occupancy of a unit in the Co-op is dependent on being accepted for membership in accordance with the Co-op's By-laws.

I/we understand that Fred Dowling Co-operative Inc. is formed for the purpose of providing housing at cost to its members and that membership includes the responsibility to participate in the Co-op.

I understand that the Co-op requires its members to share responsibility and to follow its by-laws, policies and any applicable rules and regulations.

I agree to actively participate in the operations of the Co-op.

I/we understand that all information contained in this application is confidential and will be used for membership purposes only.

I/we hereby authorise the Co-operative to verify any or all of the information contained herein and to perform a credit check on members of this household at the discretion of the Co-operative.

I/we understand that I/we have a right to refuse to give the Co-operative the information it requires and that the Co-operative has the right to refuse to consider my/our application for membership if the application is incomplete or if I/we choose not to give the Co-operative any information that it needs to process the application.

I/we hereby authorise the Co-operative to verify any or all of the information from present or former landlords, leaseholders or financial mortgage companies as such information pertains to my housing.

I/we understand that a membership fee of \$10.00 for each person aged 16 years or older in the household is applicable, along with a unit deposit to hold a unit in my name, once our membership is approved and a unit chosen.

I understand that there are no refunds of membership fees or member deposit if I subsequently decide not to move into the Co-operative.

Signatures of Applicants

Name:		Date
Name:		Date

Schedule B: Membership Approval Process

1. Roles and responsibilities

The Board of Directors will delegate the responsibility for the membership process to a Membership Committee and co-op staff. Board members cannot be members of the Membership Committee.

The Board of Directors will appoint the members of the Membership Committee and approve the job description for the committee. The Membership Committee will consist of co-op general members. All members involved in the membership process must sign Confidentiality Agreements and respect all rules around Conflicts of Interest as contained in Article 13 of the Organizational By-law

The Membership Committee will report on recommendations for new members to the Board. The Board has the final say on accepting or rejecting an application, basing their decisions on information provided by staff and the Membership Committee following the application and interview process detailed below.

When the board decides to refuse an application, the applicant is entitled to request an appeal of the decision. The rules about requesting an appeal are in the co-op's Membership Approval and Unit Allocation Board Policy.

2. Interview Process

The co-op staff is responsible for conducting rental and credit checks, completing an Application Summary Sheet and scheduling interviews. The Application Summary Sheet will include the following information:

- name, ages and relationship of the household
- rental history
- size of the unit requested

The Summary Sheet will not include information on the market or geared-to-income status of the household. The following will be the process for interviewing applicants for the External Waiting List:

1. Staff will inform the board that the External Waiting List needs to be updated.

2. Staff will make a public posting through relevant channels that the External Waiting List is open, specifying in the posting which size of units are potentially opening.
3. Staff will send the Application Summary Sheet to households that have expressed interest in being placed on the external waiting list. The Application Summary Sheet will then be returned by the external household to the co-op office for processing
4. Applications will be processed by staff based on the date they are received, until the required number of slots on the Waiting List is filled. For example, if there are 3 openings on the 1 bedroom External Waiting List, the first 3 applications received by staff will be selected for moving forward to the next stage of the process. Subsequent applications received will be dated and filed for future reference.
5. Staff will coordinate with the Membership Committee to arrange interviews with the applicants. Every member of a household that is 16 years of age or older must attend the interview.
6. The Membership Committee shall conduct interviews with applicants
7. The interviewer(s) will complete and sign the Interview Form including their recommendations. The form will be forwarded to staff and the board for approval and to the Membership Committee for information only.
8. Staff will conduct rental and credit checks of applicants following the interviews
9. The Membership committee's assessment and Staff's reports on rental/credit checks are forwarded to the Board of Directors for assessment
10. The Board makes a decision about each application and the applicants are notified

If the above process leaves slots on the waiting list unfilled, then the process begins again with either moving down the list of initial applications or putting out a new call for new applications.

The Interview Form completed after each interview shall be in a format approved by the board and must comply with the criteria described in Articles 1.2, 1.3 1.4 of this By-law. The co-op may use the Interview Form attached to this By-law as Schedule C.

3. Membership Decisions

The board can make a decision to approve or refuse an application, or the board can make other decisions such as a second interview.

Schedule C: Membership Interview Form (1)

To be completed by interviewers recommending acceptance

Date	Applicant	Interviewer(s)
Applicant requested: Modified unit	Applicant requested: Size of unit: Type of unit:	Household Composition

Membership Criteria	Reasons why interviewers believe that Membership criteria will be met
The household's credit and rental history together with other financial information gives the co-op reasonable grounds to believe the household will pay the housing charge in full and on time	To be completed by staff – not an area for Interviewers
The household meets the applicable occupancy standards	
Shows a positive attitude towards living in the co-op and is likely to treat other members with respect	
Interested in contributing to the operation of the co-op	
Willing to maintain the unit	

Observations and comments:

Schedule C: Membership Interview Form (2)
To be completed by interviewers recommending refusal

Date	Applicant	Interviewer(s)
Applicant requested: Modified unit	Applicant requested: Size of unit: Type of unit:	Household Composition

The co-op can reject applicants for the following reasons only. The co-op must advise the applicants and provide details to support this decision

Membership Criteria	Reasons for this decision
There are reasonable grounds to believe that based on the applicant's rental and credit history together with other financial information, the applicants may fail to pay the housing charge in full and on time	
The household does not meet the applicable occupancy standards – number, gender and ages of the members of the household	
The applicant did not agree to accept the responsibilities of membership in the co-op or There are reasonable grounds to believe that the applicants will not accept or will be unable to accept the responsibilities of membership	

Observations and comments:

Schedule D: Internal Transfer Application

Name:

Current Unit No.:

Number of bedrooms in current unit:

Number of bedrooms requested:

Other household members who will be living with you:

Name	Date of birth	Relationship (if applicable)

Length of time in current unit: _____

Reasons for requesting a transfer:

- Overhoused - fewer occupants than allowed under the applicable occupancy standards
- Underhoused - more occupants than allowed under applicable occupancy standards
- Expecting a future increase in household members
- Expecting a future decrease in household members
- Family abuse
- Medical condition or disability makes the unit inaccessible or aggravates a condition
- Current housing charge unaffordable (market-paying household)
- Other (specify)

Please add any other relevant details about why you are seeking transfer:

I understand that the Internal Transfer process is subject to the provisions of the Membership Approval and Waiting List Board Policy and that the co-op may require documentation to support this application to transfer. I agree to update the co-op with any change of circumstances that might affect my internal transfer application. I declare that I am a member in my current unit and have resided there without any absence that would have cancelled my membership under the co-op's Occupancy By-Law.

Signed:

Date: