

4 July 2022

s9(2)(a)

Thank you for your requests of 22 May 2022 for the following information under the Official Information Act 1982 (the Act):

Email one:

1. *Can you please provide me with the list of questions that you ask prospective tenants during your 45 minute screening interview prior to placing them in permanent social housing?*
2. *Can you also provide information on how you follow up to verify that the information given is true and correct?*

Email two:

3. *Could you please provide information on how Kainga Ora establish links between prospective tenants for social housing and the areas they are placed in?*

The Ministry of Social Development (MSD) decides who qualifies for public housing – this is based on need. When someone applies for public housing, MSD carries out a thorough assessment to determine their eligibility. Once MSD has completed the eligibility process, individuals who qualify for public housing are added to the housing register. You can find further information about MSD's housing and support services here: [Ministry of Social Development - housing and support services - Ministry of Social Development \(msd.govt.nz\)](http://www.msd.govt.nz/ministry-of-social-development-housing-and-support-services)

The role of Kainga Ora is to assess the public housing properties that are available and place people from the housing register into a suitable Kāinga Ora home, based on need and eligibility. MSD and Kāinga Ora work closely if there are any changes in an individual's circumstances.

*1. Can you please provide me with the list of questions that you ask prospective tenants during your 45 minute screening interview prior to placing them in permanent social housing?*

Kāinga Ora is committed to providing customers with a suitable home and the right support to live well in their homes and communities. To support this, we seek to gain insight into a customer's housing and wellbeing needs to help us to find the right home and neighbourhood for them and their whānau.

This is done through a Pre-housing Conversation (PHC) with the customer, which takes place before a customer is placed in a Kāinga Ora home. During this conversation, we talk to them about their connections to schooling, the community and other groups to help us make a suitable housing match. This conversation allows Kāinga Ora to establish a positive relationship with the customer and gain insight into their housing and wellbeing needs.

As part of this response, I am providing you with the following guidelines used by our staff to conduct these Pre-housing Conversations with our customers:

- Guidelines to complete the Pre-Housing Conversation and
- Pre Housing Conversation Summary

*2. Can you also provide information on how you follow up to verify that the information given is true and correct?*

Successful placement in a Kāinga Ora home relies on knowledge of the customer's situation, which is ascertained by MSD as part of the application process. During the application process, MSD requests documents of proof to verify a customers' circumstances. Before Kāinga Ora undertakes a Pre-housing Conversation, customers are required to sign a Pre-Housing Conversation Privacy Statement which gives Kāinga Ora permission to confirm that the information we have received from MSD is up to date. We can then help find appropriate housing and identify appropriate housing support, if required.

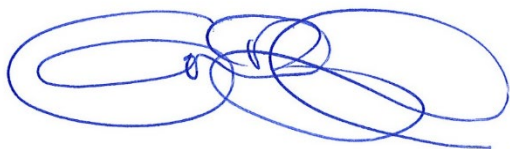
*3. Could you please provide information on how Kainga Ora establish links between prospective tenants for social housing and the areas they are placed in?*

We have a range of policies and process in place to help support the placement process and ensure customers are matched with a suitable home. In response to this question, please find attached the following documents:

- Manage Tenant Transfer
- Match to Suitable Home Policy
- Guidelines for matching applicants and customers to a home
- Match applicants and customers to a suitable home.

Please note that Kāinga Ora proactively releases its responses to official information requests where possible. Our response to your request may be published at <https://kaingaora.govt.nz/publications/official-information-requests/> with your personal information removed.

Nāku iti noa, nā



Caroline Butterworth  
**Deputy Chief Executive – Auckland and Northland**

## Guidelines for completing Pre-Housing Conversation

CT-GDL-011

### Contents

<b>1. Overview</b>	<b>3</b>
1.1 Purpose	3
1.2 Grounded in Te Whare Tapa Whā	4
1.3 Our customers	4
1.3.1 Social housing applicants	4
1.4 Voluntary participation	5
1.5 Pre-Housing Conversation Privacy Statement	5
<b>2. Pre-Housing Conversation administrative requirements</b>	<b>5</b>
<b>3. Arranging for Pre-Housing Conversation</b>	<b>6</b>
3.1 Checking existing support services	6
3.2 Applicant/Customer understanding and expectation	6
3.3 Scheduling the Conversation	7
<b>4. Preparing for Pre-Housing Conversation</b>	<b>8</b>
4.1 Safety considerations	8
4.2 Face to face meeting preparation	8
<b>5. Aspects of Pre-Housing Conversation</b>	<b>9</b>
5.1 Welcome and introductions	9
5.2 Setting the scene	10
5.3 Beginning the conversation	11
5.4 Going through the MSD form	11
5.5 Understanding what's important	12
5.5.1 Applicants/Customers' priorities	13
5.5.2 Whānau priorities	14

5.5.3	Pets and broader family and friends.....	14
5.5.4	Community and social connections.....	14
5.6	Recording the conversation.....	15
5.6.1	Key trade-offs.....	16
5.6.2	Support needs identified.....	16
5.7	Discussing next steps.....	16
<b>6.</b>	<b>Concluding the Pre-housing Conversation.....</b>	<b>16</b>

Released under the Official Information Act 1982

## 1. Overview

The Pre-Housing Conversation is our opportunity to begin to build a positive, trusting relationship with our new applicants/customers and their whānau. It's a chance to demonstrate who we are, as the team at Kāinga Ora, by showing our values in action – manaakitanga, mahi tahi, and whanake. It's a great way to get to know our new applicants/customers and their whānau to understand what's important to them in a home and how we can set them up to live well.

The Conversation is optional. It is preferable for this conversation to be completed face to face. There will be instances or exceptions where this is not possible and can be completed over the phone.

Our approach is strengths-based and people-centred, with an emphasis on the wellbeing of our new customer(s) and their whanau.

### 1.1 Purpose

The purpose of the Pre-Housing Conversation is to understand what is important to the applicant/customer and their whānau. Our aim is to create a safe, relaxed and unstructured platform for our applicants/customers to feel comfortable enough to share about themselves and what matters the most to them when it comes to a home.

At this stage, the sole focus will be on getting to know the applicant/customer and building a relationship with them. The CT-FRM-005 Pre-Housing Conversation Summary should be completed towards end of the meeting.

We want to gather information our applicant/customer is willing to share to:

- gain a clear understanding of their current circumstances; and
- help us identify their aspirations in relation to housing and wellbeing support needs.

Specifically, we want to:

- confirm the information we've received from the Ministry of Social Development (MSD) is up to date and that the recommended number of bedrooms is correct;
- give applicants/customers the opportunity to help us to identify the best home for them, by understanding whānau needs and aspirations;
- enable us to check if applicants/customers need any additional support from MSD to move into and/or furnish their home, and to support their wellbeing during this time;
- understand the level of likely ongoing support required from our Housing Support team to identify the best Housing Support Manager; and

- help applicants/customers understand next steps – the process to select the house, their rights to accept or refuse the house, and the pathways available to them.

A summary of the discussion will be captured on the Pre-Housing Conversation Summary (CT-FRM-005), alongside the applicant/customer, towards the end of the meeting.

## 1.2 Grounded in Te Whare Tapa Whā

Core to the Pre-Housing Conversation is understanding what is important to the applicant/customer using the Te Whare Tapa Whā (Four dimensions of wellbeing) listed below:

- Te Taha Wairua (Spiritual)
- Te Taha Hinengaro (Mental & Emotional)
- Te Taha Whānau (Social & Family)
- Te Taha Tinana (Physical).

We create a relaxed atmosphere, through a free flowing conversation, letting the

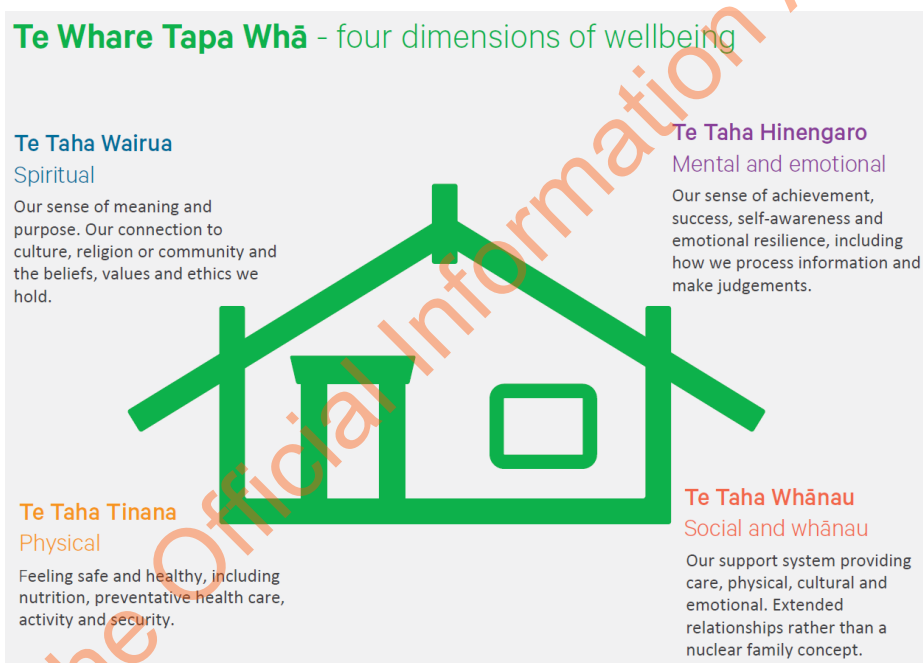
applicant/customer lead the conversation so that they are in full control of the information they choose to share about themselves.

The Advisor Placement guides the conversation to ensure we have a holistic understanding of our applicant/customer's housing and wellbeing support needs to enable the whānau to live well in their home.

## 1.3 Our customers

### 1.3.1 Social housing applicants

Our new applicants have come to us because the Ministry of Social Development (MSD) has assessed their eligibility for public housing. Through our pre-housing conversation and our initial engagement comes an opportunity to begin fostering a relationship and building trust with an incoming customer. Customers involved in a business-initiated transfer (BIT)



As we have established relationship with our BIT customers, we only complete a Pre-Housing Conversation if we have not been in touch with them in the last 3 months, or we are unclear about their housing needs or priorities. We are responsible for matching existing customers from the Business Initiated Transfer (BIT) list to alternative Kāinga Ora homes.

## 1.4 Voluntary participation

The Pre-Housing Conversation is voluntary. The information we receive from the applicant/customer helps us select the best home for them and their whānau. However, if the applicant/customer chooses not to have a Pre-Housing Conversation, or share certain information during the conversation, it is important we reassure them that it doesn't change their placement priority.

Nevertheless, we should encourage them to participate in the conversation as it will enable us the best opportunity in finding the right home, place and support, and contribute to sustaining tenancies and thriving communities. It also allows us to ask questions to help understand their needs and priorities so we can best match a home for them. For more detail, see section: [Aspects of the Pre-Housing Conversation](#).

## 1.5 Pre-Housing Conversation Privacy Statement

Maintaining the privacy of the information that applicants/customers share is critical. We will always discuss the Pre-Housing Conversation Privacy Statement (CT-FRM-007) with every applicant/customer before the conversation begins. They must agree to it before we can proceed with the Conversation.

## 2. Pre-Housing Conversation administrative requirements

Pre-Housing Conversation Privacy Statement (CT-FRM-007), the Pre-Housing Conversation Summary (CT-FRM-005), and Next Steps after Pre-Housing Conversation (CT-FRM-008) are available in Atamai. The Advisor Placement will download and complete these forms manually.

On conclusion of the Pre-Housing Conversation, the Advisor Placement will:

- Give the applicant/customer the completed the Next Steps after Pre-Housing Conversation (CT-FRM-008). You don't need to keep a copy of this.
- Check if the applicant/customer would like a copy of the Pre-Housing Conversation Summary and Privacy Statement for their own records.
- Scan and save the Pre-Housing Conversation Summary (CT-FRM-005), and Pre-Housing Conversation Privacy Statement (CT-FRM-007) in Objective.

- **For applicants:** S:\WLG\Hi Hsg Initiatives\01 Tenancy Services\Work Areas\Placement – Pre-Placement Interviews
- **For existing customers:** Properties > Address > Tenancy and Tribunal > Customer folder
- Create a note in Kotahi to confirm the Pre-Housing Conversation has been completed with the applicant/customer and record the outcome of the conversation and any support needs identified. (**Applications > Person Details > open Notes region > Create > Create Notepad Entry > enter notes > Save**).
- Securely dispose of / shred the completed forms once they have been saved in Objective.

### 3. Arranging for Pre-Housing Conversation

#### 3.1 Checking existing support services

Before arranging the Pre-Housing Conversation, it is important that we review the information we received from MSD.

- Review any existing support services the applicant may have. Connecting with existing support services will further strengthen our matching process to ensure the right home based on their housing and wellbeing needs
- We must have the applicant's consent before we make contact with any of their support services.

#### 3.2 Applicant/Customer understanding and expectation

Ensure the applicant/customer understands the purpose of the conversation so they know what to expect and can feel positive about the meeting.

Before scheduling the meeting, tell them why we would like to have a pre-housing conversation with them and cover the following:

- **Conversation benefits**

Tell about the benefits of participating in the conversation, that is, it will allow:

- applicant/customers to give us more detail on their housing and well-being needs to support the information we've received from MSD;
- us to confirm their details and housing needs, and to ask questions – which will help us find the best home, place (community) and support for them.

- **Existing support services**

Ask them about their existing support services (as noted in their MSD form) and give



them the opportunity to bring their support worker if they wish.

- **Bringing along whānau or support person**  
Tell them they are welcome to bring their whānau or any other support person to the Pre-Housing Conversation (for example, children or key support person).
- **Applicant/Customer choice on where they would like to have this conversation**  
We should discuss options with the applicant/customer of where they would feel most comfortable for the conversation to take place. Be familiar with standard health and safety procedures and guidelines such as Manage customer risk register, SS-GDL-110 Staying Safe and Secure, before arranging to meet applicants / customers in person.
- **Language interpretation services**  
If they need any language interpretation services at the meeting, tell them we can organise interpreting services for them. This can be someone from Ezispeak or someone they want to bring along.

**Note:**

Ezispeak is our preferred provider for telephone interpreting. We have access to telephone interpreters 24 hours a day, seven days a week, in a multitude of languages and does not need to be pre-booked.

For more details see [Ezispeak - NZ Government Interpreting Service — Kāinga Ora](#)

- **Voluntary participation**  
Inform the applicant/customer that Pre-Housing Conversation is voluntary:
  - If they do not want to have this conversation, we will use information provided by MSD to find them a home.
  - Reassure them there will be no impact on their placement (that is, if they choose not to have this conversation or share certain information during the conversation).
  - If they agree to have a conversation, see also section on: [Scheduling the Conversation](#).
- **Participant's privacy and consent**  
Reassure them the information they provide will be kept securely and we will use it to help match them to an appropriate home.

**Note:** Our preference is that the Pre-Housing Conversation is completed face-to face. If this is not possible, the conversation will be completed over the phone.

### 3.3 Scheduling the Conversation

When scheduling the Pre-Housing Conversation:

- invite applicant/customer to bring whānau and/or support workers;
- ask who will they be bringing with them (so we can set up the room);

- if other Kainga Ora staff will be taking part in the Pre-Housing Conversation, get the applicant/customer's agreement (they must give agreement before anyone else can attend);
- confirm the location, date and time taking into consideration the customer's preferences around time and location;
- let our applicant/customer know how much time they should allow so they won't feel rushed;
- provide our applicant/customer with your contact details so they know who to contact should anything change or if they have any questions beforehand.

## 4. Preparing for Pre-Housing Conversation

### 4.1 Safety considerations

It's important everyone feels safe. You should be familiar Staying safe and Secure (SS-GDL-110) and Manage customer risk register process.

#### Considering ongoing safety

As part of the conversation, we need to be mindful of the ongoing safety of:

- applicant/customer and their household;
- Kāinga Ora staff;
- the wider community;
- our maintenance partners.

### 4.2 Face to face meeting preparation

Set up the room so our applicants/customers feel manaakitanga when they walk into the room:

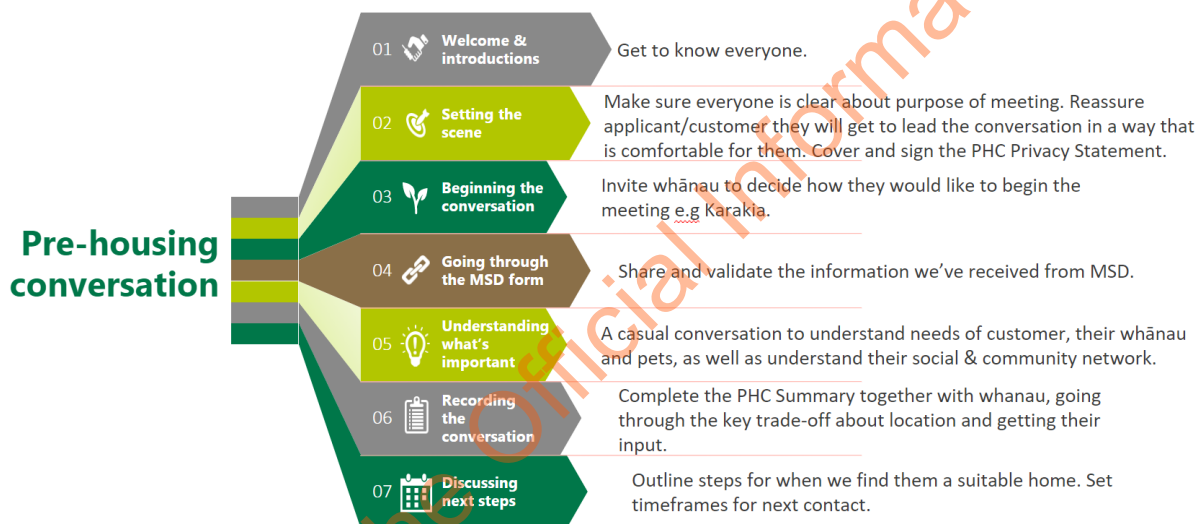
- Check there is an appropriate space available for everyone.
- If there are young children coming, provide activities so the parents can participate fully in the conversation.
- Make water or tea and coffee available.
- Think about where you will sit to ensure they will feel mahi tahi with you sitting alongside our applicants/customer(s).
- Think about how you can make the applicants/customer feel comfortable when you welcome them (that is, how you will greet them when they arrive). Be culturally aware when engaging with all applicants/customers and adapt our engagement approach where needed.

## 5. Aspects of Pre-Housing Conversation

The conversation covers multiple aspects and is broken down into seven key sections:

- [Welcome and introductions](#)
- [Setting the scene](#)
- [Beginning the conversation](#)
- [Going through the MSD form](#)
- [Understanding what's important](#)
- [Recording the conversation](#)
- [Discussing next steps](#)

Diagram below provides a summary of each point.



### 5.1 Welcome and introductions

Remember first impressions count – make sure your greeting and body language is warm and welcoming.

#### **Accompanying support worker / whanau / any other support person**

Give the applicant/customer the opportunity to introduce any of the support people accompanying them. It is important to extend manaakitanga to everybody that has accompanied the applicant/customer for the Pre-Housing conversation.

## 5.2 Setting the scene

The introduction to the meeting will help applicants/customers and their whānau to feel at ease. Take some time to cover the following:

- **Build applicant/customer rapport and anticipation**

We are looking for their help to find them a home that will support them and their whanau to not only live well but to flourish. MSD has already decided that they're on top of the waiting list, so we hope to be able to find them a suitable home soon.
- **Providing details**

Re-assure the applicant/customer it is up to them as to what details they wish to share with us.

  - Explain the more details they provide, the more it helps us work with them to find a suitable home for them.
  - If there are details they do not wish to share, it will not affect their placement priority (we will still continue to match a home based on details we currently have about them).
- **Invite applicant/customer to speak**

Invite the applicant/customer to let you know what they want to cover / achieve from the meeting.
- **Usage and storage of information**

Run through what we do with the information discussed and how it's stored.
- **Signing Pre-Housing Conversation Privacy Statement**
  - For face to face conversations, ask applicants/customers (or their representative) to sign the Pre-Housing Conversation Privacy Statement (CT-FRM-007).
  - For phone conversations, get verbal agreement and tick the consent box in the Verbal Agreement section of the Pre-Housing Conversation Privacy Statement (CT-FRM-007).
- **Note taking**

Let the applicant/customer know you may be taking some notes during this conversation and that they can have access to the notes at the end of the Pre-Housing Conversation if they want. Also explain we will be completing a Pre-Housing Conversation Summary with them, which will occur once we finish our conversation – this is to capture the information discussed so we can match them to a suitable home.
- **Final check**

Check that they are happy to proceed with the conversation.

### Notes:

- **Continue to check in** to make sure the applicant/customer still feels comfortable with going ahead with conversation. You may notice changes in the applicant/customer's

body language or breaks in the conversation where it may be useful to provide reassurance.

- **Declining to answer** – if the applicant/customer chooses not to answer a question, it's a great opportunity to provide reassurance and reinforce that there are no negative consequences for not answering questions. Do not pressure them to respond.

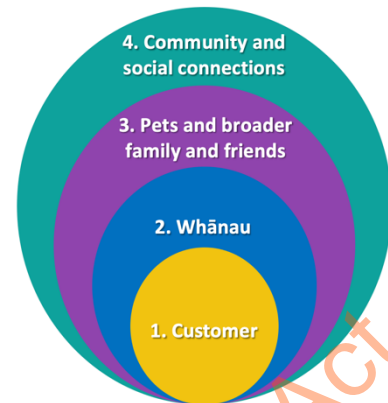
### 5.3 Beginning the conversation

- We want to enhance the mana of our applicants/customers so start by asking them if they have a preference on how they would like to start the meeting. For example, some applicants may request to start with:
  - a karakia or prayer, or
  - Whakawhanaungatanga, an active process that invites people to connect with one another (getting to know each other).
- Give an overview of how the conversation will run, such as:
  - we will go through their details in the MSD information together (**Note:** Only applies for new applicants, see: [Going through MSD form](#))
  - we will have a casual chat about what's important in a home and community (see section: [Understanding what's important](#))
  - towards the end, we will summarise details of the conversation by completing the Pre-Housing Conversation Summary together – this will be used to select the best home and support for them to move in (see section: [Recording the conversation](#))
  - finally, we will help them understand what happens from here (see: [Discussing next steps](#))

### 5.4 Going through the MSD form

- For applicants, work together through the MSD applicant summary form – so the applicant sees what we already know about them from MSD. This will demonstrate transparency that will help build trust.
- Work through all the MSD information to ensure that it is correct.
- If there is a need to contact MSD to correct, amend or update any information, particularly around changes in the number of bedrooms required, the Advisor Placement will support the applicant via a 3-way call to MSD with the applicant present to resolve any issues. Give applicant the choice whether they want to join the call with MSD, explaining that if they do not want to do this at this time, it may delay their placement – it may also mean we need to repeat the meeting to ensure information is up to date (this could be done via phone).

- If applicant wishes to continue with the meeting, Pre-Housing Conversation can still go ahead. However, we do need to explain that the match process will be on hold until MSD have updated their housing requirements.
- If applicant chooses to delay the meeting, we will work through next steps so that applicant has a clear path forward. The Pre-Housing Conversation can resume when the applicant makes contact with us again.



## 5.5 Understanding what's important

This is our opportunity to get to know our applicant/customer and their whanau through casual conversation. At this stage, the focus shouldn't be on completing the Pre-Housing Summary (but you can take notes to assist you to complete the summary later). Make sure to sit back, take your time, and let the applicants/customers share what is important to them.

Using the clues you've picked up from what people have said and the dynamics in the room, tailor our approach to what will put our applicants/customers at ease. It's key that the conversation is free-flowing to build trust and a positive relationship.

We want our applicants/customers to take time to think about the positive changes this new home will create – so we can place them into the best home. We want to understand how we can support them enhance their wellbeing. Te Whare Tapa Whā is central to our thinking.

We are to take the applicant/customer's lead to talk about what's important to them in order to understand their circumstances. While the conversation might be unstructured, it is your role as Advisor Placement to guide the conversation to cover the topics below (but not necessarily in same order):

- [Applicant/Customer priorities](#) – location of work/training, housing needs, health and support network
- [Whānau priorities](#) – location of school / work, housing needs, and health and support network
- [Pets and broader family and friends](#) – other whanau members who are important in their daily lives
- [Community and social connections](#) – support network provided by their community and other social connections.

**Note:** If the natural flow of conversation only uncovers certain aspects of the above topics, you can come back to the rest, when it is time for you to record the information in the Pre-Housing Summary (CT-FRM-005) after the casual conversation stage.

### 5.5.1 Applicants/Customers' priorities

You could begin with a conversation about what is important to our key applicants (those who will sign the Tenancy Agreement if a property is offered and accepted) or customers (each person on the Tenancy Agreement). People can find it is easier to talk about themselves because they can feel in control about what they share:

- **Get to know our applicants/customers**

Get to know them as people.

- **What's top of mind**

Ask: *"If I'm looking for a home what would you want me to look out for?"* We can learn the important things that spring to mind such as "must haves", "like to have" and "what's not important to them."

- **What will make life easier?**

This may include work or training, support for medical conditions, religious and culture requirements, accessibility and house modifications, needs for public transport, help to get furniture and financial support to set up pantry / cleaners / whiteware, etc

- **What they dream will happen once they get a home?**

Applicants/Customers probably need to warm up to this idea as they have likely not have allowed themselves to dream for a while. Helping people to dream will help them to feel positive, which will reflect on their new relationship with us and build trust. This will also provide insights on property suitability and well-being needs, based on the information they share. Conversation starters can include:

- *"How do you think life will be when you've been in your new home for 6 months?"*
- *"Think ahead 6 months after you've got the keys to your new home, how do you imagine a day at home will be like?"*

Through this conversation, we expect applicants/customers will share the transformations they would like to see in their own lives after they have been housed. This is also a good opportunity to recognise their strengths and their resilience to work through these issues. We can also talk about the support they might need to help them through the transition.

- **What factors will support turning their dreams into reality?**

This brings the conversation back to applicant/customer needs, we should cover both short and mid-term needs.

- **What are they concerned about in making this move?**

This might include concerns around wellbeing, their financial situation or the applicant/customer might be worried about losing the current support they may have in place (for example, transitional housing support).

### 5.5.2 Whānau priorities

Once we've built some trust by giving applicants/customers time to focus on themselves, they will likely switch to talking about their whānau who will be living with them in the home. By now, you will have had the time to understand the dynamics in the room to work through how best to position this conversation. It may be:

*"I'm going to try and find a home that works for you and your whanau. I'd really like to get to know you more so I can get this right."*

- **Getting to know the whānau and their needs**  
We need to understand the relationships in the whānau (to the extent they are happy to share the information). Will they be in the home full-time or on a regular basis (for example, shared custody)? This can uncover if they have health or learning needs, and any anxieties/fears.
- **What will make life easier for each of the member of the whānau?**  
For example, house modifications, school needs, work/training, proximity to public transport.
- **What will be key to get right to support positive whānau life?**  
We can understand about the needs for space and layout. Are there any safety concerns we need to understand? Maybe there are neighbourhoods that wouldn't help them to live well?
- **Are there any upcoming changes we should be aware of?** For example, the applicant/customer might be pregnant.

### 5.5.3 Pets and broader family and friends

Once we've built some trust by giving applicants/customers time to tell us about themselves and their whānau, we will move on to talking about other household members. This includes their pets, broader family and friends, and what those relationships and dynamics look like.

- **Who are their pets?**  
Find out if they have any pets. If yes, get details of many pets they have, including ages and how long they have had them. Are they service or champion dogs? Have any dogs shown aggression?
- **Who comes to visit them frequently?**  
Are there members of their whānau who regularly stay with them, for example, mokopuna (grandchildren). General locations of where their friends and broader family are based. Is it important to them they can host groups of people? Are there young children who visit frequently? Do gang members visit?

### 5.5.4 Community and social connections

Next, move onto the topic of community and social connections:



- **What groups are they part of?**  
Cover any faith affiliations, community and sports activities.
- **Who's important in supporting the whānau?**  
For example, budgetary advisors, social workers, foodbank & healthcare providers etc.
- **Do they have someone who regularly keeps in touch?**  
For example, a family member, church or community group members, or a support worker.

### **Other considerations**

Things to keep in mind as you hear what is important to applicants/customers:

- If applicant has experienced chronic homelessness/rough sleeping in the past 12 months they may be eligible for Single Site Supported Living with wrap around support services, for example, 139 Greys Avenue.
- If applicant/customer is over 65, they may benefit from being placed in a community with residents that are of a similar age group.

## **5.6 Recording the conversation**

Once we have spent some time chatting with our applicant/customer and getting to know them, their whanau and their housing needs, we will move on to completing the Pre-Housing Conversation Summary (CT-FRM-005).

It is important to note that the Pre-Housing Conversation Summary will only be completed after the discussion with the applicant/customer has been concluded and not during the conversation.

Explain to the applicant/customer what information we are going to capture, who will have access to it, and how this information will help us find them a home. When they are successfully matched to a suitable home, the information captured during the Pre Housing Conversation will be retained for the duration of their tenancy and may be updated over time. Ask them if they are okay with this. (This is part of checking in and reassuring them).

In line with fostering trust and being transparent, we will complete the Summary with our applicant/customer so they can see and agree to the information we are recording about them. Together, we will record the key information we have discussed under the four sections:

- Finding the best area
- Finding the best home
- Setting up your new home
- Support to live well

### 5.6.1 Key trade-offs

We will ask the applicant/customer for their perspective on what is of most and least importance to them, when being matched to a suitable home. This allows them to identify their trade-off decisions and their housing priorities. This approach also gives us insight into their circumstances and mind-set – it allows us to understand the key compromises they are willing to accept, when being matched to a suitable home.

### 5.6.2 Support needs identified

If there are personal support needs identified during the Pre-Housing Conversation, the Advisor Placement will provide the applicant/customer with information about support services they can access. Ensure their support need details are recorded in the Pre-Housing Conversation Summary.

If safety risks are identified, there may be some steps you can take to assist the applicant/customer such as:

- providing them with information where they can access counselling or support services (including brochures that you have on hand); or
- advising them to call 111 if they are in immediate danger.

It is important to take note of any safety concerns and discuss them with the Manager Regional Placement.

### 5.7 Discussing next steps

Next Steps after Pre-Housing Conversation (CT-FRM-008) is designed as a take-away info-sheet for applicants/customers – it includes relevant contact details as well as when they can expect to hear from us.

Spend time going through this form with them, so they are confident about what will happen from here.

See also [Pre-Housing Conversation Administrative requirements](#).

## 6. Concluding the Pre-housing Conversation

Thank our applicants/customers, their whanau and any support people they brought along.

Ask applicants/customers how they would like to end the meeting (for example, Karakia).

## Pre-Housing Conversation Summary

<b>Advisor Placement name:</b>			
<b>Customer/applicant name:</b>		<b>Conversation date:</b>	

Before starting the conversation make sure to go over CT-PRO-007 Pre-Housing Conversation Privacy Statement with the applicant/customer and their whanau regarding their privacy rights. Check if they have agreement from their whanau to provide us with information about them.

Reassure all parties present that participating in the Pre-Housing Conversation is voluntary and they can refuse to answer any questions or talk about anything that makes them feel uncomfortable at any time.

Remind applicant/customer they can also elect to stop the conversation at any time and they will not be penalised for their decision – we will continue to search for a suitable home for them.

### Finding the best area

<b>Work / vocational training</b>
<p>Information about where each member of the whanau works or attends a training institute. Key things to note:</p> <ul style="list-style-type: none"> <li>• What's important in relation to work and the area we place them in.</li> <li>• How they get to work (for example, do they have a car to get around?)</li> <li>• Location of current workplace/vocational training.</li> </ul>
<b>School</b>
<p>The location of the school / pre-school is important, especially the level of disruption on the kids if they were to move schools.</p> <p>Key things to note:</p> <ul style="list-style-type: none"> <li>• Has school become particularly important to provide stability for the kids if they have had to move frequently?</li> <li>• Understanding the comfort levels of the parents regarding transferring their kids to another school.</li> <li>• Are the kids at special schools or have extra support in the classroom that are difficult to reassign?</li> <li>• How do the kids get to school?</li> </ul>

- Do the kids go to a kōhanga reo, kura kaupapa, or kura reorua?
- Do the kids attend another school / preschool to enhance their cultural / religious understanding?

### Existing support agency network

It is important to understand the location of the applicant/customer's existing key support network, rather than medical conditions, etc. No health information is to be collected under this section. **(Note:** We need to be mindful of the information we are storing).

Key support people or organisations may include:

- Doctors / hospital
- Medical community services (for example, occupational therapy)
- Support workers (for example, Women's Refuge)
- Budgetary advisors
- Organisations providing wrap around services (for example, Salvation Army)
- Probation Officers

Also note down where the customer's existing key people are located. How often the whānau visit these key people as opposed to them being visited at home. Their means of transport, etc.

### Community and social connections

This is an opportunity to note down who is important in the lives of our applicants/customers and their whanau, and how connected they are to a support network as this might have an impact on the best area / location for the applicant.

Key things to note:

- Whānau members who don't live with them, but whose lives are intertwined with theirs (for example, regular visitors, childcare, sharing regular meals, errands, transport, etc).
- Faith-based communities.
- Gang affiliations (only if applicant/customer volunteers this information).
- Sports groups, cultural support networks, for example, marae. etc.
- Non-governmental organisations who provide general support to the whānau.

It is a good time to reassure our applicant/customer that gang affiliations / associations do not affect their eligibility to be housed.

- Whānau support network

- Community groups

- Cultural support

- Organisations supporting whānau

**Any areas you don't want to live**

This may include neighbourhoods where they have safety concerns because of certain affiliations or previous / current challenges they have faced whilst living within a community.

## Finding the best home

### Health and wellbeing needs

Information provided under this section will help determine property suitability based on the household's health and wellbeing needs (that is, managing stairs, wheelchair ramp to access the property, etc)

Check that applicant / customer has consent from their whanau to provide this information before proceeding.

- Health needs
- Cultural considerations
- Making sure everyone can get out in case of a fire

Note down their health and wellbeing needs. This could include (but is not limited to) the following:

- wheelchair access
- mobility needs relating to the home
- Visual and/or hearing impairments
- Requirements for a modified property (for example, bathroom)
- Phobias and / or fears, triggers
- Extra equipment required in the house or the need for level access. Take note if their health needs might impact on their ability to evacuate a property in the event of a fire.

## Pets

Note any requirements for pets such as, fencing, outdoor space, and if the whanau have a service or support dog.

Advise the applicant/customer they will need to show proof of dog registration when they sign their tenancy agreement.

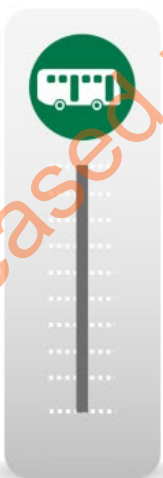
## Key Trade-offs

It's important to get the applicant/customer input into the key trade-offs (that is, compromises they are willing to make) that will assist in deciding if a property is a suitable match for them.

The slide rules below will be a catalyst for a conversation about the importance of each of these dimensions.

Together, you can mark high or low importance on each consideration. Ask the questions: Are you prepared to wait longer for a home if it means that ...

Proximity  
to public  
transport



Proximity  
to work /  
training



Proximity  
to existing  
schools



Importance of  
existing health  
support



Importance of  
existing  
support  
network



Importance of  
social network



## Apartment / Complex living in suburban areas

Sometimes the applicant/customer is matched to an apartment or a property in a complex. Make sure to discuss what is important to the applicant/customer and their whānau when deciding on the best apartment that meets their needs.

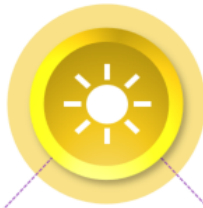
### Stairs

Physical ability of everyone in the Whānau to use stairs, including for fire evacuation



### Daytime sleeping

Need for day-time sleeping to support shift or night workers



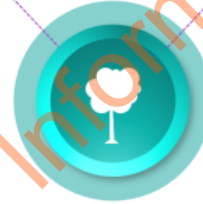
### Phobias

Fear of height and other fears that may impact on floor selection.



### Parking

Need for parking, particularly for work vehicles



### Space for kids

Safe space for preschool kids.



## Support to live well

### Identified future support needs

Provide details of any identified future support needs.

### Agreed steps

Provide details of agreed steps with customer.

### Follow up action

Provide details of any follow up action required.

## Support to move

### Setting up a new home

Record support the applicant/customer will need to help them move into their new home:

- Furniture
- Household items to set up a home
- Setting up utilities - power and broadband account
- Support with moving into new home (for example, furniture removalist)
- If the applicant/customer requires any support to move into their new home, refer the applicant to contact their Case Manager at Ministry of Social Development (MSD) for relevant assistance.

## Manage Tenant Transfer

CT-728

### Table of Contents

<b>1. Business Process Overview .....</b>	<b>2</b>
1.1 Purpose .....	2
1.2 Triggers.....	2
1.3 Roles and Responsibilities.....	2
1.4 Process- related safety risks.....	3
<b>2. Policy and Legislation .....</b>	<b>3</b>
2.1 Related legislation.....	3
2.2 Policy Context .....	4
2.3 Business Rules .....	4
<b>3. Process map .....</b>	<b>6</b>
<b>4. Procedures .....</b>	<b>7</b>
4.1 Discuss tenant’s request for a transfer .....	7
<b>5. Procedures: Business initiated transfer (BIT) .....</b>	<b>9</b>
5.1 Identifying and actioning BIT .....	9
5.1 Place tenant on BIT register .....	14
<b>6. Appendix A- Tenancy Liaison Team letter index .....</b>	<b>15</b>
<b>7. System steps .....</b>	<b>18</b>
7.1 Kotahi steps.....	18
7.2 Information Delivery Portal (IDP) reporting .....	18
7.3 Objective .....	18
<b>8. Document control.....</b>	<b>19</b>

© Kāinga Ora – Homes and Communities. This document has been developed by Kāinga Ora. Reproduction, adaptation or utilisation either in part or in whole without the prior written consent of Kāinga Ora is prohibited.

# 1. Business Process Overview

## 1.1 Purpose

The purpose of this business process is to make sure staff understand:

- the different types of transfers (Tenant initiated, business initiated)
- when a tenant initiated transfer request requires a needs assessment with the Ministry of Social Development (MSD) and if eligible they will be placed on the social housing wait list with MSD
- when a tenant can be placed on our internal register (Business Initiated Transfer (BIT) register).

## 1.2 Triggers

This business process is triggered by:

- a tenant request for a transfer
- a tenancy manager identifying that a property may no longer be suitable for a tenant, for example, it is under-occupied or overcrowded
- Kāinga Ora – Homes and Communities requiring a tenant to move due to the property being needed for another purpose.

## 1.3 Roles and Responsibilities

The following roles are involved in this process:

Role	Responsibilities
Housing advisor	<p>Receives a phone call from a tenant requesting a transfer</p> <p>Refers the tenant to the senior tenancy manager/tenancy manager to resolve tenancy issues</p> <p>Refers the tenant to MSD to discuss the tenants options for housing which may include a needs assessment</p>
Senior tenancy manager/ Tenancy manager	<p>Discusses reason for transfer request to make sure there are no other viable solutions, for example, a maintenance issue that could be resolved</p>

© Kāinga Ora – Homes and Communities. This document has been developed by Kāinga Ora. Reproduction, adaptation or utilisation either in part or in whole without the prior written consent of Kāinga Ora is prohibited.

Role	Responsibilities
	<p>Refers the tenant to MSD to discuss the tenant's options for housing which may include a needs assessment</p> <p>Identifies business initiated transfers and completes paperwork to add to register</p> <p>Attends visits with TLT where required</p>
Tenancy liaison team (TLT)	<p>Manages the process for business initiated transfers where possible</p> <p>Supports the tenant throughout the end to end process</p> <p>Issues 90 day notice to effected tenants</p> <p>Manages relocation process</p>
Placement team	<p>Registers tenants application for business initiated transfer and places them on the BIT register</p> <p>Where a tenant has a change in housing requirements and requires a needs assessment, emails MSD</p> <p>Updates the BIT register with any change in housing requirements following an assessment with MSD</p>

#### 1.4 Process- related safety risks

The general hazards faced by staff when working in the office or while out of the office are documented in HS-205 Staying Safe and Secure.

## 2. Policy and Legislation

### 2.1 Related legislation

- Housing Restructuring and Tenancy Matters Act 1992.
- Residential Tenancies Act 1986.

© Kāinga Ora – Homes and Communities. This document has been developed by Kāinga Ora. Reproduction, adaptation or utilisation either in part or in whole without the prior written consent of Kāinga Ora is prohibited.

## 2.2 Policy Context

Kāinga Ora has policies which state the entitlements, rights and responsibilities of tenants when transferring, either temporarily or permanently, from their Kāinga Ora property to alternative one.

Kāinga Ora policy and procedures seek to balance the needs of the tenants with Kāinga Ora responsibilities to provide housing for New Zealanders in greatest housing need, to use its resources efficiently, and to protect the value of its assets. Kāinga Ora seeks to make sure there is consistent treatment of tenants regardless of whether they are being approached by Kāinga Ora to move to another property because of redevelopment, reconfiguration, and refurbishment or to best match the property.

This process makes sure that tenants are consulted about their housing requirements and needs, and have the appropriate information to choose alternative housing. It is to be undertaken in a culturally appropriate manner. It also aims to minimise any disadvantage to the tenant caused by a transfer and moving back, where moving back is possible.

## 2.3 Business Rules

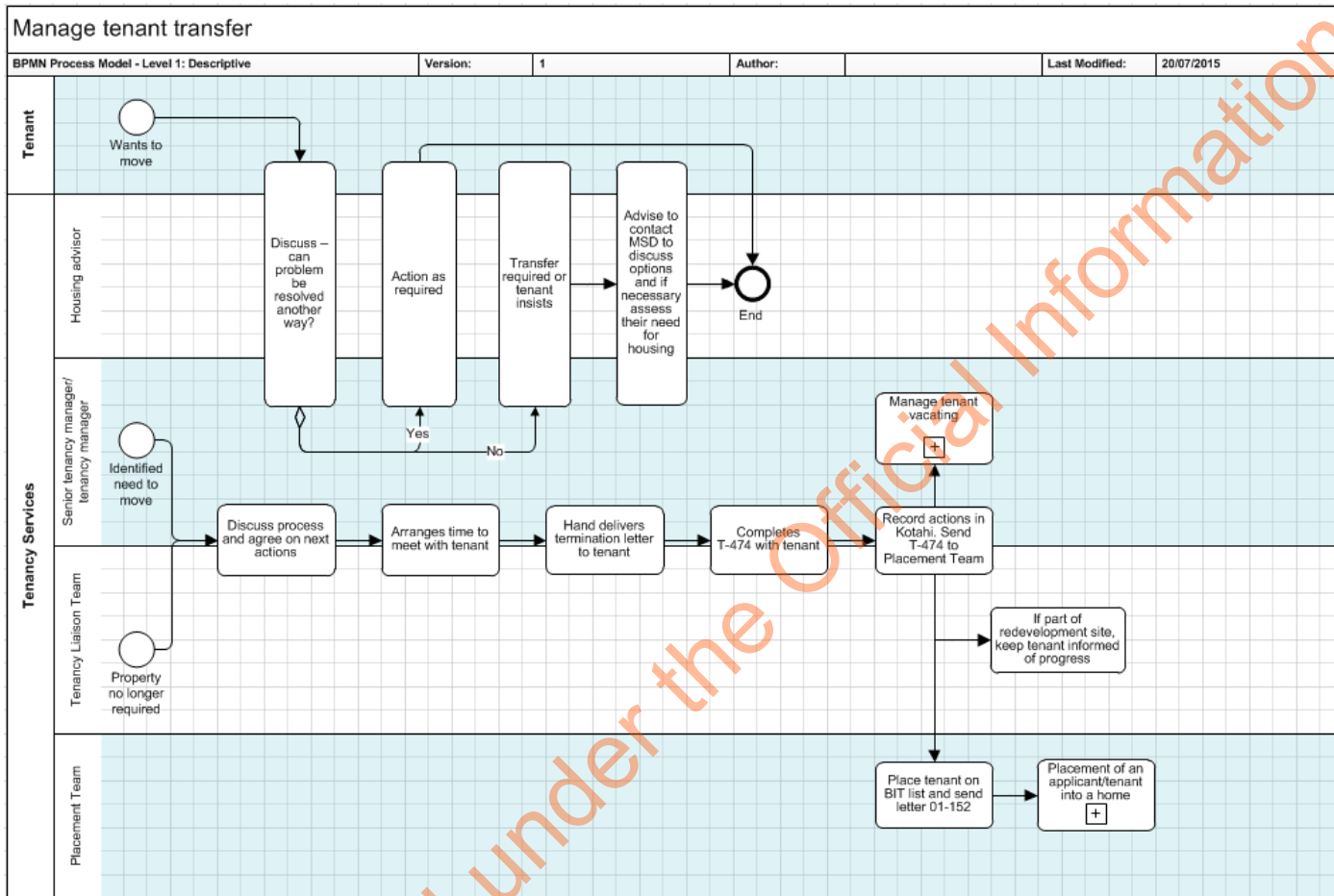
ID	Rule
1	For tenant initiated transfers the staff member must first make sure there is no other viable solution to resolve the situation.
2	Where the tenant is requesting a transfer and there is no tenancy management issue, the tenant is referred to MSD to discuss their options for housing and if required MSD will undertake a needs assessment. The tenant must meet the eligibility criteria and will be placed on the MSD social housing wait list.
3	For business initiated transfers, the tenant may be transferred over on the same conditions as their current tenancy. Refer T-244 Tenant transfer guidelines for the rules on charging of rent.
4	While the RTA allows landlords to charge a bond equivalent of up to four weeks rent, our policy is to not charge a bond.  If a tenant is transferring and a bond is held at the property they are moving out of, the bond will be refunded as long as there is no rent or damage debt outstanding. If IRR debt is owed, it does not fall under the jurisdiction of the Tenancy Tribunal as it is Crown debt and not debt owed to Kāinga Ora. The bond cannot be used towards IRR debt unless the tenant agrees to it.

© Kāinga Ora – Homes and Communities. This document has been developed by Kāinga Ora. Reproduction, adaptation or utilisation either in part or in whole without the prior written consent of Kāinga Ora is prohibited.

ID	Rule
5	<p>In situations where redevelopment, refurbishment or reconfiguration of the property will not occur in the short-term (within 120 days), the relevant area manager may approve allocation of a property on a short, fixed-term basis or as a form of transitional housing. This must be negotiated with the programme manager of the works programme. Tenants must be made aware of the pending works at the time of offering the property and made aware of the options available to them, for example, returning to the same property once works are completed or transferring to another property permanently. The offer must be in writing and clearly specify that the housing is only a temporary solution.</p> <p>When a property is occupied by a tenant on a fixed-term agreement that extends beyond the start date of the work move, early termination can only be achieved with the agreement of the tenant.</p>
6	<p>TLT will oversee any business initiated transfer process (where possible) and work with the senior /tenancy manager and the Placement Team to support the tenant through the process. The TLT will also manage the matching and relocation process for moves identified by People and Property but handed through to the TLT as required.</p>
7	<p>For a business initiated transfer, if a tenant is required to move and accepts the offer of another property the TLT will make the offer, take the tenant to view the property and once accepted will arrange the tenant's relocation to their new home. TLT will organise all reasonable relocation costs such as moving costs, disconnection/reconnection of telephone, power and gas where appropriate.</p>
8	<p>Minor developments can sometimes proceed without tenants being required to transfer. However, in rare circumstances tenants may be given the opportunity to transfer as part of negotiations for the development to proceed.</p>
9	<p>If a tenant was required to move temporarily. On receiving the 15 day notice that the construction phase or required work is almost complete, the TLT advise the regional team of the completion of construction and start preparations for the tenant who moved temporarily while the work was completed to return to their original home.</p>
10	<p>Tenants are allowed to keep pets as long as they meet local council bylaws and our criteria. Approval must be obtained from the senior/tenancy manager. Refer to business process 'Managing pets' (CT-773).</p>

© Kāinga Ora – Homes and Communities. This document has been developed by Kāinga Ora. Reproduction, adaptation or utilisation either in part or in whole without the prior written consent of Kāinga Ora is prohibited.

### 3. Process map



© Kāinga Ora – Homes and Communities. This document has been developed by Kāinga Ora. Reproduction, adaptation or utilisation either in part or in whole without the prior written consent of Kāinga Ora is prohibited.



## 4. Procedures

### 4.1 Discuss tenant's request for a transfer

#### Role

- Customer support advisor.
- Senior tenancy manager/tenancy manager.

#### When to use

Use this procedure to:

- discuss a tenant's request for a transfer
- make sure there is not another viable solution.

A viable solution is where Kāinga Ora may be able to find a workable solution so the tenant can remain at their current property. For example, if a tenant has safety concerns because there is no enclosed yard for their children there may be another viable solution.

The tenant request for a transfer may be made via a phone call, email, letter, or during a home visit.

#### Systems and Tools

This procedure uses:

- HS-205 Staying Safe and Secure.
- Customer Risk Register (CRR).
- Hazard Register (HR Hub).
- HS-305 Safe Work Plan.

#### Before you start

Before starting this procedure, make sure preparation has been carried out from a health, safety and security perspective to actively manage risks by:

- being familiar with workplace hazards and hazard controls
- practising situational awareness
- participating in safety briefings and by planning workload
- following safe work practices both in the office and when mobile
- getting out if in doubt – personal safety comes first.

© Kāinga Ora – Homes and Communities. This document has been developed by Kāinga Ora. Reproduction, adaptation or utilisation either in part or in whole without the prior written consent of Kāinga Ora is prohibited.

## Steps

Step	Action								
1	<p>Access the tenant's record in Kotahi, and check their risk profile (MyPortal&gt;ClientView&gt;search on client (enter search criteria)&gt;check 'Key Details' under 'Customer Profile').</p> <p>If the tenant is abusive, aggressive or threatening, and/or has a Category A, B or C hazardous customer risk rating, or when it is suspected that the tenant may be potentially hazardous but has not yet been rated in CRR, then:</p> <ul style="list-style-type: none"> <li>• activate the procedural practices for Hazardous Customers before continuing with this procedure</li> <li>• discuss with area manager and prepare a safe work plan. This is a requirement for a hazardous customer. The safe work plan will look at the variables and threat levels and determine how best to proceed</li> <li>• implement the agreed safe work plan</li> <li>• refer to 'Customer Risk Register (CRR) policies' and business process CT-751 'Manage Customer Risk Register'.</li> </ul>								
2	<p>Determine if a transfer is the best option, for example identify if a maintenance request could fix a problem or if it is a tenancy management issue that should be addressed.</p> <table border="1"> <thead> <tr> <th>If...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>the problem can be resolved another way (customer support advisor)</td> <td> <ul style="list-style-type: none"> <li>• action as required for example, let a job or email senior/tenancy manager to contact the tenant to address the tenancy issue</li> <li>• this process ends.</li> </ul> </td> </tr> <tr> <td>the problem can be resolved another way (senior/tenancy manager)</td> <td> <ul style="list-style-type: none"> <li>• if required encourage the tenant to ring the Customer Support Centre to raise a request/make a complaint as required</li> <li>• action the issue</li> <li>• this process ends.</li> </ul> </td> </tr> <tr> <td>the tenant insists on a transfer and does not meet Business Initaited Transfer criteria</td> <td> <ul style="list-style-type: none"> <li>• advise the tenant they will have to contact MSD who will discuss their</li> </ul> </td> </tr> </tbody> </table>	If...	Then...	the problem can be resolved another way (customer support advisor)	<ul style="list-style-type: none"> <li>• action as required for example, let a job or email senior/tenancy manager to contact the tenant to address the tenancy issue</li> <li>• this process ends.</li> </ul>	the problem can be resolved another way (senior/tenancy manager)	<ul style="list-style-type: none"> <li>• if required encourage the tenant to ring the Customer Support Centre to raise a request/make a complaint as required</li> <li>• action the issue</li> <li>• this process ends.</li> </ul>	the tenant insists on a transfer and does not meet Business Initaited Transfer criteria	<ul style="list-style-type: none"> <li>• advise the tenant they will have to contact MSD who will discuss their</li> </ul>
If...	Then...								
the problem can be resolved another way (customer support advisor)	<ul style="list-style-type: none"> <li>• action as required for example, let a job or email senior/tenancy manager to contact the tenant to address the tenancy issue</li> <li>• this process ends.</li> </ul>								
the problem can be resolved another way (senior/tenancy manager)	<ul style="list-style-type: none"> <li>• if required encourage the tenant to ring the Customer Support Centre to raise a request/make a complaint as required</li> <li>• action the issue</li> <li>• this process ends.</li> </ul>								
the tenant insists on a transfer and does not meet Business Initaited Transfer criteria	<ul style="list-style-type: none"> <li>• advise the tenant they will have to contact MSD who will discuss their</li> </ul>								

© Kāinga Ora – Homes and Communities. This document has been developed by Kāinga Ora. Reproduction, adaptation or utilisation either in part or in whole without the prior written consent of Kāinga Ora is prohibited.

Step	Action
	housing options and if necessary assess their need for housing.
	<ul style="list-style-type: none"> <li>a transfer is required and meets Business Initiated Transfer criteria</li> <li>go to Identifying and actioning Business Initiated Transfer (BIT) (4.2)</li> </ul>

### What happens next?

- If the tenant chooses to contact MSD, their housing need will be assessed and if eligible will be placed on the MSD social housing wait list. This process ends.
- If the tenant no longer wishes to transfer, this process ends.

## 5. Procedures: Business initiated transfer (BIT)

### 5.1 Identifying and actioning BIT

#### Role

- Senior/tenancy manager.
- Tenancy Liaison Team (TLT).

#### When to use

Use this procedure when Kāinga Ora requires a tenant to move due to the home not being fit for purpose, the asset is not being appropriately utilised and/or financially the property is no longer viable. There are three ways a BIT may be identified.

1. When a senior/tenancy manager identifies the need for a business initiated transfer. For example the tenant may be living in a home that is too large for their needs, property is uninhabitable due to fire damage or Anti-Social Behaviour agreed transfer.
2. When Kāinga Ora has made a decision to redevelop a site or requires a tenant to move out of:
  - an Home Lease Programme (HLP) property where the lease is due to expire
  - a property that has been assessed as earthquake prone or earthquake damaged
  - a property that has been approved to be sold or demolished
  - a property that is not suitable for occupation and will not be repaired

© Kāinga Ora – Homes and Communities. This document has been developed by Kāinga Ora. Reproduction, adaptation or utilisation either in part or in whole without the prior written consent of Kāinga Ora is prohibited.

- a property has been identified for bedroom extension under the Right Size Project and the current tenant no longer has a need for a larger home (Better utilisation). With area manager and tenant consent to transfer.
3. Where Kāinga Ora has a new build and a current tenant would be suitable to relocate into the new home, as they would enhance the community mix and look after the property. To qualify the tenant must transfer from the same number bedrooms as the new build. That is, if the tenant is in a two bedroom home they can be offered a new build with two bedrooms. This transfer is termed 'like for like'. If a tenant is a market renter, they are not to be offered a 'like for like' transfer. The reason being, market renters will be reviewed by MSD under the Reviewable Tenancies policy and other alternative housing options will be considered.

**Note:**

- Where ever possible the BIT will be managed by the TLT to make sure there is clarity and consistency of practice. Where this is not possible People and Property staff will follow this process.
- 'Tenant transfer guideline' (T-244) is to be used in conjunction with this procedure.
- Where a damaged building is required to be vacated as soon as possible due to the extent of the damage refer to Residential Tenancies Act 1986 s59A and seek advice from Legal.
- Where a tenant requires modifications TLT will work with the tenant and the occupational therapist to make sure a suitable property is found. This may be by finding an existing modified property or a property that could potentially be modified.
- Where an HLP owner will not allow modifications or Rheumatic Fever interventions to be carried out, the TLT will work with the tenant and the occupational therapist/case worker to make sure a suitable property is found.

**System and Tools**

This procedure uses:

- HS-205 Staying Safe and Secure.
- Customer Risk Register (CRR).
- Hazard Register (HR Hub).
- HS-305 Safe Work Plan.
- 05-210 90 day termination notice.

© Kāinga Ora – Homes and Communities. This document has been developed by Kāinga Ora. Reproduction, adaptation or utilisation either in part or in whole without the prior written consent of Kāinga Ora is prohibited.

- T-474 Kāinga Ora business initiated transfer interview sheet.
- T-242 Customer visit guidelines.
- T-244 Tenant transfer guidelines.

### Before you start

Before starting this procedure, make sure preparation from a health, safety and security perspective to actively manage risks by:

- being familiar with workplace hazards and hazard controls
- practising situational awareness
- participating in safety briefings and by planning work load
- following safe work practices both in the office and when mobile
- getting out if in doubt – personal safety comes first.

### Steps

Step	Action						
1	<p>How has the BIT been identified?</p> <table border="1"> <thead> <tr> <th>If by...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>the senior/tenancy manager</td> <td> <ul style="list-style-type: none"> <li>• contact the TLT</li> <li>• go to step 3.</li> </ul> </td> </tr> <tr> <td>Kāinga Ora</td> <td> <ul style="list-style-type: none"> <li>• go to step 2.</li> </ul> </td> </tr> </tbody> </table>	If by...	Then...	the senior/tenancy manager	<ul style="list-style-type: none"> <li>• contact the TLT</li> <li>• go to step 3.</li> </ul>	Kāinga Ora	<ul style="list-style-type: none"> <li>• go to step 2.</li> </ul>
If by...	Then...						
the senior/tenancy manager	<ul style="list-style-type: none"> <li>• contact the TLT</li> <li>• go to step 3.</li> </ul>						
Kāinga Ora	<ul style="list-style-type: none"> <li>• go to step 2.</li> </ul>						
2	<p>Once the business has confirmed that the project/process is at the stage for the 90 day notice to be issued, the TLT will contact the senior/tenancy manager to discuss the process.</p> <p><b>Note:</b></p> <p>TLT will have undertaken a number of visits prior to this process. A list of letters used by TLT can be found in 'Appendix A'.</p> <p>'Tenant transfer guidelines' (T-244), must be used in conjunction with this procedure.</p>						
3	<p>TLT and the senior/tenancy manager will check the tenant's risk profile (MyPortal &gt; ClientView &gt; search on client (enter search criteria)&gt;check 'Key Details' under 'Customer Profile').</p> <p>If the tenant is abusive, aggressive or threatening, and/or has a Category A, B or C hazardous customer risk rating then:</p>						

© Kāinga Ora – Homes and Communities. This document has been developed by Kāinga Ora. Reproduction, adaptation or utilisation either in part or in whole without the prior written consent of Kāinga Ora is prohibited.

	<ul style="list-style-type: none"> <li>• activate the procedural practices for hazardous customers before continuing with this procedure</li> <li>• discuss with the area manager and Manager Tenancy Liaison and prepare a safe work plan. This is a requirement for a hazardous customer. The safe work plan will look at the variables and threat levels and determine how best to proceed</li> <li>• implement the agreed safe work plan</li> <li>• refer to 'Customer Risk Register (CRR) policies' and business process CT-751 'Manage Customer Risk Register'.</li> </ul>
4	<p>TLT and the senior /tenancy manager will discuss the process and agree on who will take the following actions.</p> <ul style="list-style-type: none"> <li>• Who will carry out the visit (making sure if the tenant has a risk rating, the appropriate number of staff are at the visit and a safe work plan is in place).</li> <li>• Who will contact the tenant and check their availability and agree on a time for the visit.</li> <li>• Who will set the visit time in outlook and send a meeting request to all parties required to be at the visit.</li> <li>• Who will print letter 05-210 '90 day termination notice' and the relevant letter to be attached to the 90 day notice.</li> </ul> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• For information on scheduling, preparing and completing a visit, refer to T-242 'Customer visits guideline'.</li> </ul> <p>T-244 'Tenant transfer guidelines', must be used in conjunction with this procedure.</p>
5	<p>Prior to the visit, staff attending the visit must re-check the tenant's risk profile in Kotahi. (MyPortal&gt;ClientView&gt;search on client (enter search criteria)&gt;check 'Key Details' under 'Customer Profile').</p> <p>If the tenant is abusive, aggressive or threatening, and/or has a Category A, B or C hazardous customer risk rating, or when it is suspected the tenant may be potentially hazardous but has not yet been rated in CRR, then:</p> <ul style="list-style-type: none"> <li>• activate the procedural practices for Hazardous Customers before continuing with this procedure</li> <li>• discuss with area manager and or the Manager Tenancy Liaison and prepare a safe work plan. This is a requirement for a hazardous customer. The safe work plan will look at the variables and threat levels and determine how best to proceed</li> <li>• implement the agreed safe work plan</li> </ul>

© Kāinga Ora – Homes and Communities. This document has been developed by Kāinga Ora. Reproduction, adaptation or utilisation either in part or in whole without the prior written consent of Kāinga Ora is prohibited.

	refer to 'Customer Risk Register (CRR) policies' and business process CT-751 'Manage Customer Risk Register'.						
6	<p>At the agreed date and time visit the property.</p> <table border="1"> <thead> <tr> <th>If the tenant...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>is not home</td> <td> <ul style="list-style-type: none"> <li>continue to try and contact the tenant to make sure a visit is carried out.</li> </ul> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>Staff must make every attempt to contact the tenant and arrange a time to visit, as a 90 day notice must be hand delivered to the tenant.</li> </ul> </td> </tr> <tr> <td>is home</td> <td> <ul style="list-style-type: none"> <li>go to step 7.</li> </ul> </td> </tr> </tbody> </table>	If the tenant...	Then...	is not home	<ul style="list-style-type: none"> <li>continue to try and contact the tenant to make sure a visit is carried out.</li> </ul> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>Staff must make every attempt to contact the tenant and arrange a time to visit, as a 90 day notice must be hand delivered to the tenant.</li> </ul>	is home	<ul style="list-style-type: none"> <li>go to step 7.</li> </ul>
If the tenant...	Then...						
is not home	<ul style="list-style-type: none"> <li>continue to try and contact the tenant to make sure a visit is carried out.</li> </ul> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>Staff must make every attempt to contact the tenant and arrange a time to visit, as a 90 day notice must be hand delivered to the tenant.</li> </ul>						
is home	<ul style="list-style-type: none"> <li>go to step 7.</li> </ul>						
7	<p>During the visit:</p> <ul style="list-style-type: none"> <li>hand them letter '90 day termination notice' (05-210)</li> <li>explain to the tenant: <ul style="list-style-type: none"> <li>why they need to move</li> <li>Kāinga Ora will work with them to find another Kāinga Ora home and that any reasonable costs associated with them moving will be covered</li> <li>they will only be moved to a home that meets their current need.</li> </ul> </li> </ul> <p>If the tenant needs:</p> <ul style="list-style-type: none"> <li>less bedrooms than they have now and there is no other housing need a smaller home can be offered</li> <li>more bedrooms than they have now, every attempt to find the right sized property must be found</li> </ul> <p>They will be placed on a BIT register with Kāinga Ora and priority is based on the end date of the 90 day notice.</p> <p>If they have any concerns or need clarification during the process Kāinga Ora is there to support them through the process.</p>						
8	Complete T-474 'Kāinga Ora business initiated transfer interview sheet'.						

© Kāinga Ora – Homes and Communities. This document has been developed by Kāinga Ora. Reproduction, adaptation or utilisation either in part or in whole without the prior written consent of Kāinga Ora is prohibited.

	<p><b>Note:</b></p> <p>If a tenant refuses to sign T-474 this must be flagged to the Manager Tenant Liaison, area manager and National Manager Placement Outcomes. The information on the form is entered into Kotahi following the same process as a signed T-474.</p>
9	<p>Following the visit the senior/tenancy manger/TLT will:</p> <ul style="list-style-type: none"> <li>record the outcome of the visit in the 'Notes' region in Kotahi (Estates&gt;Tenancies&gt;enter search criteria&gt;click on 'Please Select&gt;Tenancy Details&gt;Notes region).</li> <li>advise concerned parties of outcome of visit (if senior tenancy manager/tenancy manager did not accompany TLT or other way around).</li> <li>scan and email the Placement Team 'Kāinga Ora business Initiated T-474 Transfer interview sheet' and a copy of 05-210 '90 day termination notice'.</li> </ul>

### What happens next?

The senior/tenancy manager will carry out the pre-vacation inspection and manage the vacation process as set out in business process: CT-749 'Manage tenant vacating'.

The Placement Team will register the tenant in Kotahi – see procedure: 'Place tenant on BIT register'.

If the property is part of a redevelopment site, the TLT team will keep the tenant informed of any delays in the process and any alterations to the plans. A list of letters used by TLT can be found in 'Appendix A'.

## 5.1 Place tenant on BIT register

### Role

- Placement Team.

### When to use

Use this procedure to place a tenant on the BIT register.

### Systems and Tools

This procedure uses:

- T-474 Kāinga Ora business initiated transfer interview sheet.
- Kāinga Ora BIT register.
- 01-152 Successful applicant – relocation due to better use/redevelopment.
- 01-153 Successful applicant – relocation due to better use/development – MSD advised outcome of assessment.

© Kāinga Ora – Homes and Communities. This document has been developed by Kāinga Ora. Reproduction, adaptation or utilisation either in part or in whole without the prior written consent of Kāinga Ora is prohibited.



## Steps

Step	Action
1	<p>On receipt of T-474 'Kāinga Ora business initiated transfer interview sheet' enter the information into Kotahi. (Allocations &gt; Applications).</p> <p><b>Note:</b> Tenants on the BIT register are prioritised according to the date of the expiry of the 90 day notice or relevant notice period.</p>
2	<p>If a tenant requires a larger home, this will be indicated on the T-474 'Kāinga Ora business initiated transfer interview sheet'.</p> <p>The Placement Team will update the application on the BIT register with any changes and send 01-153 'Successful applicant – relocation due to better use/development – MSD advised outcome of assessment' (01-153).</p>
3	<p>Set up and place the interview sheet, successful applicant letter and termination letter on a file.</p>

### What happens next?

TLT will look for suitable matches for tenants on the BIT register and send the matches through to the Placement Team to undertake the veto process and enter into the system. See business process: CT-727 'Placement of an applicant/tenant into a home'.

## 6. Appendix A- Tenancy Liaison Team letter index

© Kāinga Ora – Homes and Communities. This document has been developed by Kāinga Ora. Reproduction, adaptation or utilisation either in part or in whole without the prior written consent of Kāinga Ora is prohibited.

Reference number	Letter title
04-010	Meeting request – initial visit
04-020	Tenant not home for initial visit
04-030	Confirmation of discussion at initial visit
04-040	Confirmation of discussion to divest
04-050	Confirmation of discussion to remove/vacate (use for all other asset decisions)
04-060	Update tenant on progress of identified proposed redevelopment site
04-070	Advise tenant of external site visit by consultant/contractor
04-080	Advise tenant of external site visit by surveyor
04-090	Advise tenant of external site visit for ground testing - Geotech
04-100	Advise tenant of external site visit for ground testing – drilling rig
04-110	Advise tenant of external site visit – drainage check
04-120	Advise tenant of external site visit – Auckland City Council
04-130	Meeting request for internal inspection
04-140	Identified proposed redevelopment is not proceeding
04-150	Meeting request to show plans for proposed redevelopment site
04-160	Meeting request to show revised plans for proposed redevelopment site
04-170	Tenant not home for meeting to show plans for proposed redevelopment site
04-180	Confirmation of plans signed visit
04-190	Confirmation of discussion at plan visit – permanent relocation
04-200	Confirmation of discussion at plan visit – temporary relocation

© Kāinga Ora – Homes and Communities. This document has been developed by Kāinga Ora. Reproduction, adaptation or utilisation either in part or in whole without the prior written consent of Kāinga Ora is prohibited.

04-210	Confirmation of decision to remove/vacate – permanent relocation
04-220	Confirmation of decision to divest
04-230	Confirmation of resource consent to remove/demolish property – permanent relocation
04-240	Confirmation of consent to extend property – permanent relocation as underutilised – to be used by Rightsize project only
04-250	Confirmation of resource consent – temporary relocation
04-260	Notice of work commencing – remaining in current home
04-270	Confirmation of relocation date and costs – sign up not completed
04-280	Confirmation of relocation date and costs – sign up completed

© Kāinga Ora – Homes and Communities. This document has been developed by Kāinga Ora. Reproduction, adaptation or utilisation either in part or in whole without the prior written consent of Kāinga Ora is prohibited.

## 7. System steps

### 7.1 Kotahi steps

If you clicked a hyperlink to get here, press **Alt + Left Arrow** to return to your place in the procedure.

Action	Kotahi path
<b>Enter action</b>	Record path

### 7.2 Information Delivery Portal (IDP) reporting

If you clicked a hyperlink to get here, press **Alt + Left Arrow** to return to your place in the procedure.

Action	IDP path
<b>Enter action</b>	Record path

### 7.3 Objective

If you clicked a hyperlink to get here, press **Alt + Left Arrow** to return to your place in the procedure.

Action	Objective path
<b>Enter action</b>	Record path

© Kāinga Ora – Homes and Communities. This document has been developed by Kāinga Ora. Reproduction, adaptation or utilisation either in part or in whole without the prior written consent of Kāinga Ora is prohibited.

## 8. Document control

### Version release

Current and previous versions of this document are stored in our document management system, and are managed by the Technical Writing team. For any queries contact [busdoc@kaingaora.govt.nz](mailto:busdoc@kaingaora.govt.nz).

Version	Reason for change

### SME review

Name	Designation	Date

### Endorsers

Legal		Date
Business Owner		Date

### Keywords for Atamai

--

### Information architecture

© Kāinga Ora – Homes and Communities. This document has been developed by Kāinga Ora. Reproduction, adaptation or utilisation either in part or in whole without the prior written consent of Kāinga Ora is prohibited.

# Policy: Match to a suitable home (POL-354)

**Issue Date:** 6 November 2021

**Approved by:** GM National Service

**Owner:** Practice and Customer Contact

**Author:** Operational Policy

## Contents

Purpose .....	2
Background .....	2
Responsibilities when allocating public housing.....	3
Scope.....	4
Operating principles.....	4
Policy.....	4
Our commitment to housing high priority applicants and customers .....	4
Placement priority .....	4
Balancing priority and suitability for applicants and customers.....	4
Understanding the applicant or customer’s needs .....	5
Determining an unsuitable match .....	6
Bypass .....	6
Withdraw .....	7
<i>Housing specification needs</i> .....	7
<i>Legal requirements</i> .....	8
<i>Escalation pathway</i> .....	8
Manual match.....	8
Making an offer and viewing the property .....	9
Accepting an offer.....	9
Declining an offer.....	9

Definition of terms.....	9
Related policies, procedures, legislation and documents .....	12
Review.....	12
Document control.....	12
Appendix 1: Principles for placement priority .....	13
Appendix 2: Acceptable reasons to bypass an applicant.....	15
Appendix 3: Acceptable reasons to withdraw a property match .....	16
Appendix 4: Overview of match process .....	23

## Purpose

1. This policy outlines the approach that Kāinga Ora – Homes and Communities (Kāinga Ora) takes when matching an applicant or customer and their whānau to a suitable Kāinga Ora home.
2. For the purpose of this policy:
  - the term ‘applicant’ refers to a person on the Social Housing Register who may be considered for a Kāinga Ora home, but is not yet a Kāinga Ora customer.
  - a person is considered a customer once they have accepted an offer for an available Kāinga Ora property.

## Background

3. One part of the objective of Kāinga Ora is to contribute to sustainable, inclusive and thriving communities that provide people with good quality, affordable housing choices that meet diverse needs.<sup>1</sup> As New Zealand’s largest public housing landlord, a key part of our role is providing rental housing principally to those most in need.<sup>2</sup>
4. Under our Customer Strategy, Kāinga Ora is committed to providing customers with a suitable home and the right support. The aim of matching a customer and their whānau to a suitable home, and providing the right level of tenancy management services, is to support customers to live well in their homes and sustain a tenancy for as long as they need.<sup>3</sup>
5. Living in a suitable home that meets the needs of a household is a foundation for achieving other forms of wellbeing. Research indicates that people who feel their housing is unsuitable are more likely to report lower levels of life satisfaction.<sup>4</sup> The negative impacts of housing instability can also manifest across all four dimensions of wellbeing: taha tinana (physical), taha whānau (social), taha hinengaro (emotional) and taha wairua (spiritual).<sup>5</sup>

<sup>1</sup> Section 12, Kāinga Ora – Homes and Communities Act 2019

<sup>2</sup> Section 13(1)(a) Kāinga Ora – Homes and Communities Act 2019

<sup>3</sup> Kāinga Ora Sustaining Tenancies Framework

<sup>4</sup> Stats NZ (2020). Housing in Aotearoa: 2020. Retrieved from [www.stats.govt.nz](http://www.stats.govt.nz).

<sup>5</sup> Durie, M. (1998). Whaioara: Māori health development. Oxford University Press.

6. Providing a suitable home from the first time a customer enters a Kāinga Ora home enables them to maintain stable housing and enhances their overall wellbeing. This contributes to wider societal benefits, particularly for tamariki, such as improved school attendance and rates of immunisation. This should also reduce the prevalence of customers transferring properties or exiting public housing and becoming homeless.
7. Under our Customer Strategy and Wellbeing Approach, Kāinga Ora is also committed to being whānau-centred and placing customers at the centre of our decision-making. This means that we will endeavour for every decision to be made with the customer's needs in mind.
8. Kāinga Ora houses customers who experience a variety of needs, including those with high and complex needs. While many customers and their whānau are relatively independent, some require additional support to live well in their homes, sustain successful tenancies and thrive in their community.

### **Responsibilities when allocating public housing**

9. Management, prioritisation and allocation of public housing is a responsibility shared between the Ministry of Social Development (MSD) and Kāinga Ora.<sup>6,7</sup>
10. MSD is tasked with managing the Social Housing Register and is responsible for identifying an applicant's housing need, level of priority, and housing specification requirements.<sup>8,9</sup>
11. An applicant's level of housing need is identified through undertaking a Housing Needs Assessment at the time of application. Applicants are prioritised as either 'Priority A' (severe housing need that must be addressed immediately) or 'Priority B' (serious housing need).<sup>10</sup>
12. Applicants identified as 'Priority A' are considered to be in the greatest need and are the highest priority on the Social Housing Register. Applicants are also given a 'needs score' out of 20 (20 being highest need) to allow for further prioritisation.
13. Existing Kāinga Ora customers might be placed on the Business Initiated Transfer (BIT) register where there is a business need to rehome a customer from their current Kāinga Ora property into another Kāinga Ora property.
14. Kāinga Ora is responsible for matching applicants from the Social Housing Register, and customers from the BIT register, to a suitable Kāinga Ora home. Kāinga Ora is required to allocate properties fairly, transparently and on the basis of need. This must be balanced with achieving a sustainable match (taking into account specific characteristics of the applicant and the neighbourhood).<sup>11</sup>

---

<sup>6</sup> Public and Community Housing Management Act 1992

<sup>7</sup> Note, the shared responsibility between MSD and Kāinga Ora only applies to the social housing that Kāinga Ora administers

<sup>8</sup> Section 2 Public and Community Housing Management (Appointment of Agency and Regulatory Authority) Order 2018

<sup>9</sup> Section 101 Public and Community Housing Management Act 1992

<sup>10</sup> Note, these priority categories are also referred to as a 'Needs Rating'

<sup>11</sup> Tenant Placement Principal, Schedule 6 [2.b], Open Term Services Agreement between Ministry of Housing and Urban Development, Housing New Zealand Corporation and Housing New Zealand Limited 2019



## Scope

15. This policy applies to the Coordinator Placement, Advisor Placement, and Advisor Customer Liaison (the 'Placement Team') when matching:

- an applicant from the Social Housing Register to a Kāinga Ora home; and/or
- existing customers who require a transfer to another Kāinga Ora home.<sup>12</sup>

## Operating principles

16. The operating principles from the Kāinga Ora – Homes and Communities Act 2019 that are most likely to be relevant to this policy are as follows:

- Supporting tenants to be well connected to their communities, to lead lives with dignity and the greatest degree of independence possible; and to sustain tenancies
- Working with community providers to support tenants and ensure those most in need are supported and housed
- Being a fair and reasonable landlord, treating tenants and their neighbours with respect, integrity, and honesty.

17. Other operating principles may apply to this policy as circumstances require. Any action taken to match an applicant or customer to a suitable home should be undertaken in line with these operating principles.

## Policy

### **Our commitment to housing high priority applicants and customers**

18. Kāinga Ora is responsible for ensuring that, where a property becomes available, a high priority applicant or customer takes up residence in the home.

### **Placement priority**

19. The priority in which applicants and customers are matched to a Kāinga Ora home is determined by the principles as outlined in [Appendix 1: Principles for placement priority](#). A customer on the BIT register may take priority over an applicant on the Social Housing Register, in accordance with the placement priority principles.

### **Balancing priority and suitability for applicants and customers**

20. When a property becomes available, a customer with a high priority BIT reason will be considered for the property first. A customer with a high priority BIT reason must be offered the property, unless the match is considered unsuitable.

---

<sup>12</sup> This may be through a Business Initiated Transfer or other transfer request

21. Where there are either no customers with a high priority BIT reason, or the available property is unsuitable for a customer with a high priority BIT reason, then a high priority applicant from a Social Housing Register shortlist will be considered for the available property.
22. The highest priority applicant from the shortlist must be offered the property, unless the match is considered unsuitable.<sup>13</sup> This takes into account both the applicant's priority rating and the suitability of the property match.
23. Under our agreement with Te Tūāpapa Kura Kāinga – Ministry of Housing and Urban Development, Kāinga Ora must be able to provide written records explaining why an applicant has been selected for a particular property.<sup>14</sup> In doing so, we must demonstrate:
- how we have met our obligation to allocate properties fairly, transparently and on the basis of need; and
  - how this decision has been balanced against achieving a sustainable housing match.

### Understanding the applicant or customer's needs

24. While MSD provides Kāinga Ora with information from an applicant's Housing Needs Assessment, there is further opportunity to identify whether a housing match is suitable.
25. To support our ability to make a suitable housing match, Kāinga Ora provides all applicants and customers with the opportunity to complete a Pre-housing Conversation. Completing a Pre-housing Conversation supports Kāinga Ora to further understand the housing needs of an applicant/customer and their whānau, and identify any support that might be needed to move, successfully settle in and live well in their new home.<sup>15</sup>
26. The Pre-housing Conversation is primarily guided by the information the applicant or customer wishes to share regarding their housing and personal support needs. It is not an opportunity to re-assess or verify the applicant or customer's eligibility for social housing. See the [CT-GDL-011 Guideline to Complete the Pre-housing Conversation](#) for further information on undertaking a Pre-housing Conversation. Refer also to the [SS-GDL-110 Staying Safe and Secure Guideline](#) when undertaking a Pre-housing Conversation.
27. As a Pre-housing Conversation may be undertaken before a match is confirmed or an offer is made, applicants or customers should not be made aware of the potential property during the Pre-housing Conversation.<sup>16</sup> An applicant or customer is not made aware of a property match until an offer is presented.

---

<sup>13</sup> Tenant Placement, Schedule 6 [1.c], Open Term Services Agreement between Ministry of Housing and Urban Development, Housing New Zealand Corporation and Housing New Zealand Limited 2019

<sup>14</sup> Tenant Placement Principal, Schedule 6 [2.b], Open Term Services Agreement between Ministry of Housing and Urban Development, Housing New Zealand Corporation and Housing New Zealand Limited 2019

<sup>15</sup> See the [Pre-housing Conversation Policy](#) for further information on what information may be collected during the Pre-housing Conversation, and how this information may be used.

<sup>16</sup> This is because, if a Pre-housing Conversation takes place before a property is fully vacant, there is the potential for circumstances to change so that the property is no longer available. There may also be some privacy implications for the current tenant should we make applicants aware of a property before it is fully vacant.

28. The Pre-housing Conversation is not mandatory. Therefore, refusal to participate in a Pre-housing Conversation will not adversely impact on an applicant or customer's ability to be housed by Kāinga Ora. Refer to [CT-GDL-006 Guideline for matching applicants and customers to a home](#) for assistance when an applicant or customer chooses not to participate in a Pre-housing Conversation.

### **Determining an unsuitable match**

29. There are two points where Kāinga Ora may determine that a property is unsuitable for an applicant or customer:
- a. A 'bypass' can be completed by the Placement Team after a shortlist has been received from MSD for an available property, and before an initial property match has been made.
  - b. A 'withdraw' can be completed by the Placement Team after a Pre-housing Conversation has been offered (and completed if accepted), and before an applicant or customer accepts or declines the available property.

### **Bypass**

30. A bypass may occur under limited circumstances, and when the available property is unsuitable for an applicant based on its similarity to a property that was previously withdrawn or declined. This is to reduce the administrative burden on both the applicant and Kāinga Ora of proceeding further where the property is likely to be withdrawn or declined for substantially the same reason as it was previously withdrawn or declined.
31. The decision to bypass an applicant must be made according to the conditions outlined in [Appendix 2: Acceptable reasons to bypass an applicant](#). The Placement team must always record a reason for the bypass decision.
32. The Placement Team will draw on the following information to inform the decision to bypass an applicant:
- Information within Kotahi on reasons why the applicant was previously bypassed for, withdrawn from, or declined an available property
  - Information from a previous Pre-housing Conversation or previous recorded interactions with the applicant during the placement process
  - Information from the MSD Social Housing Register application.
33. A bypass can only be made where there is sufficient and current information available to determine whether the property is clearly unsuitable for the applicant. It is unlikely that there will be sufficient information available if it is the first time that an applicant is the highest priority for an available property. For example, the applicant may not have completed a Pre-housing Conversation. This requirement is to ensure that Kāinga Ora engages with the applicant to find out what a suitable match might look like.

34. If the Placement Team does not have sufficient or current information available, or is unsure whether there is sufficient or current information available, to make an informed decision, then the applicant cannot be bypassed and the match must proceed to the next stage.

### **Withdraw**

35. A withdraw may occur where a property match is considered to be unsuitable after taking into account the needs of the applicant or customer and the details of the available property. A property match may be considered unsuitable on two grounds:

- a. the property is unsuitable taking into account the applicant or customer's [Housing specification needs](#); or
- b. the property is unsuitable due to [Legal requirements](#).

36. If neither of these grounds apply, a property must be offered to the applicant or customer. This provides the applicant or customer with the opportunity to view the property and determine whether the property match is right for them and their whānau.

### *Housing specification needs*

37. Property suitability is predominantly determined according to the housing specification needs of the applicant or customer as stated on their Social Housing Register or BIT application. This might include the required number of bedrooms, the property location, any accessibility requirements, or other specifications of the property.

38. For a property to be considered unsuitable according to housing specification needs, the property must meet the criteria outlined in [Appendix 3: Acceptable reasons to withdraw a property match](#)

**Appendix 3: Acceptable reasons to withdraw a property match.** The Placement Team should consult with the applicant or customer at every appropriate and available opportunity before making the decision to withdraw a property match.

39. It is not a requirement that a property match must be withdrawn if the criteria in Appendix 3 are met. The Placement Team, in consultation with the applicant or customer, may choose to proceed with the property match if the match is considered to be suitable.
40. If an offer is made to an applicant or customer, a withdraw may only be actioned with applicant/customer agreement, and where the criteria in **Appendix 3: Acceptable reasons to withdraw a property match** have been met.

#### *Legal requirements*

41. There are some circumstances where a property match must be withdrawn because the applicant or customer is subject to legal requirements regarding property placement. A property will be considered unsuitable according to legal requirements for situations such as where:
  - the placement would result in a violation of the applicant or customers' probation conditions; or
  - the placement would result in a violation of the requirements for placing child sex offenders<sup>17</sup>
  - the placement would result in an applicant/customer being in close proximity to a person protected from the applicant/customer by a restraining order or protection order.
42. Where a property match is considered to be unsuitable due to legal requirements, the Placement Team does not have discretion to determine whether to withdraw a property match. If the criteria outlined above are met, then the property match must be withdrawn.

#### *Escalation pathway*

43. Where agreement cannot be reached within the Placement Team about whether a property match is unsuitable, the matter may be escalated through the agreed escalation pathway. For further information on the escalation pathway, refer to CT-GDL-006 Guideline for matching applicants and customers to a suitable home.

#### **Manual match**

44. There are some limited circumstances where Kāinga Ora may need to match an applicant to a property outside of the Placement Priority Order. When this is required, the applicant will be manually matched to the property.
45. A manual match can only occur when:
  - An applicant has been identified; and
  - A suitable property is available; and
  - MSD have given approval for the manual match.

---

<sup>17</sup> refer to CT-PRO-301 Monitor and Assess Child Sex Offender Placement

46. A manual match may be initiated by either Kāinga Ora or MSD. If MSD is the initiator and requests that an applicant be matched urgently, Kāinga Ora will proceed with a manual match if a suitable property is available. If Kāinga Ora is the initiator, the delegated Manager Regional Placement is responsible for liaising with the Interagency Team who will contact MSD to request a manual match be approved. The delegated Manager Regional Placement has discretion to decide when a manual match will be put forward to MSD (via the Interagency Team). For more information, refer to CT-GDL-006 Guideline for matching applicants and customers to a suitable home.

### **Making an offer and viewing the property**

47. Where a property match is considered suitable, the Placement Team will make an offer to the applicant or customer. When presenting an offer, the Placement team must clearly set out the reasonable timeframe that the applicant or customer must provide their response to the offer by.

48. Every applicant or customer that is offered a property will also be offered an opportunity to view the property. This is to support applicants and customers to make an informed decision about whether the property is suitable for them and their whānau. It is not necessary for an applicant or customer to view a property before responding to an offer if they are unable to, or choose not to, attend a viewing.

49. Refer to CT-GDL-006 Guideline for matching applicants and customers to a suitable home for information on health and safety considerations when undertaking a property viewing.

### **Accepting an offer**

50. Applicants or customers who wish to accept an offer must do so within an agreed reasonable timeframe as set by Kāinga Ora. If Kāinga Ora does not hear back from the applicant or customer within the agreed timeframe, all reasonable efforts will be made to contact the applicant or customer to confirm their acceptance of the property. In the event Kāinga Ora is still unable to make contact, the offer will be treated as a decline.

### **Declining an offer**

51. Should an applicant or customer decline an offer of a property, Kāinga Ora will notify MSD. Kāinga Ora is responsible for appropriately recording the reason/s why an applicant or customer has declined a property.

52. Following a declined offer, Kāinga Ora must discuss with the applicant whether they wish to be bypassed from similar available properties in the future based on the reason the applicant or customer gives for the decline of the current available property.

## **Definition of terms**

<b>Term</b>	<b>Definition</b>
<b>Applicant</b>	A person who is eligible for social housing and is yet to be housed by a social housing provider (ie, an individual on the Social Housing Register).

	For the purpose of this policy, the term ‘applicant’ is used to refer to a person who may be considered for a Kāinga Ora property, but is not yet a Kāinga Ora customer.
<b>Business Initiated Transfer</b>	Where Kāinga Ora requires a customer to move out of the property they are currently renting for business reasons, they are placed on the Kāinga Ora Business Initiated Transfer (BIT) Register.
<b>Bypass</b>	A system response in Kotahi where, if the available Kāinga Ora property is unsuitable for the highest priority applicant, the next highest priority applicant may be considered for the available property instead.
<b>Customer</b>	A person who is a tenant of a Kāinga Ora property and anyone living at the property with the tenant’s permission.  For the purpose of this policy, a person is considered a customer once they have accepted an offer for an available Kāinga Ora property.
<b>Housing Needs Assessment</b>	Assessment undertaken by MSD to assess an applicant’s level of housing need.
<b>MSD Social Housing Register</b>	Register held by MSD that prioritises applicants who have been assessed as eligible for social housing. Kāinga Ora pulls a shortlist from the Register when a Kāinga Ora property becomes available.
<b>MSD Transfer Register</b>	Register held by MSD which operates in the same way as the Social Housing Register, except that an applicant will have a TR (transfer register) next to the application number, rather than a HR (housing register).  The MSD Transfer Register is used for existing customers who require a move, but where none of the BIT reasons apply. In these circumstances, customers are referred to MSD.
<b>Placement Priority</b>	This determines the priority in which applicants or customers may be matched to available properties.
<b>Pre-housing Conversation</b>	Conversation between applicants/customers and Kāinga Ora to inform a suitable match decision. This is a voluntary conversation that is focussed on an applicant/customer’s housing and wellbeing needs.
<b>Shortlist</b>	List of applicants on the MSD Social Housing Register who have been matched to a Kāinga Ora property by Kotahi.
<b>Waitlist</b>	List of applicants on the MSD Social Housing Register. This list is refreshed and updated on a regular basis.
<b>Withdraw</b>	An offer status in Kotahi. Where a property match is not suitable for an applicant or customer, they may be withdrawn so that the match does

	not proceed. Applicants who are withdrawn will remain on the MSD waitlist.
--	--

Released under the Official Information Act 1982



## Related policies, procedures, legislation and documents

53. This document should be read in conjunction with the following policies, processes and guidance:

- CT-GDL-006 Guideline for matching applicants and customers to a home
- CT-PRO-001 Match applicants and customers to a suitable home
- CT-728 Manage tenant transfer
- CT-GDL-011 Guideline to complete the Pre-housing conversation
- Sustaining Tenancies Framework
- Framework for supporting public housing customers to access social support services
- Pre-housing Conversation policy
- SS-GDL-110 Staying Safe and Secure

54. Relevant legislation:

- Kāinga Ora – Homes and Communities Act 2019
- Public and Community Housing Management Act 1992
- Open Term Services Agreement between Ministry of Housing and Urban Development, Housing New Zealand Corporation and Housing New Zealand Limited 2019
- Ministerial Direction on Eligibility for Social Housing 2014
- Treaty of Waitangi
- Residential Tenancies Act 1986
- Health and Safety at Work Act 2015
- Privacy Act 2020

55. Relevant strategies and frameworks:

- Customer Strategy
- Kāinga Ora Strategy
- The Māori Strategy
- Wellbeing Approach
- Community Strategy

## Review

56. This policy will be reviewed on an as needed basis.

## Document control

Date	Reviewed/Modified by	Comments/Descriptions of changes
Nov 2021	Alice Palmer – Senior Policy Advisor	Drafted

## Appendix 1: Principles for placement priority

A Business Initiated Transfer (BIT) must be given priority over a MSD Housing Register applicant where the BIT is considered high priority.

Priority is determined by applying the following principles:

1. **Safety and security** – we will prioritise the health and wellbeing of customers and their whānau, where a property poses a significant risk or is causing detrimental effects to a customer’s health or wellbeing.
2. **Legal obligations** – we will prioritise transfers where it is required to meet legal obligations such as where the lease has expired or the customer is required to move residence because of a court order.
3. **Enabling housing for future customers** – we will prioritise transfers where a customer is required to move from their current property in order to allow for a redevelopment or other asset related matter to take place.
4. **Empowering customers to maintain connections to their communities** – we will give customers choice where we can and help make their house a home by enabling them to maintain connections to their communities.

In order to be considered a high-priority BIT, consideration must be given to whether the BIT is necessary to ensure one of the principles outlined above is met. Applicants on the Social Housing Register will be given priority over other (non-high priority) BIT customers.

Principle	Includes (but is not limited to):
Safety and Security	<ul style="list-style-type: none"> <li>• Where rheumatic fever has been identified and the applicant/customer and their whānau need to be urgently placed in a suitable Kāinga Ora property, or moved to an alternative Kāinga Ora property.</li> <li>• the property is uninhabitable due to damage by fire or flood, structural damage, or due to meth contamination</li> <li>• where there is significant overcrowding (characterised as requiring 2 bedrooms or more)</li> <li>• Modification moves such as:               <ul style="list-style-type: none"> <li>- where a customer no longer requires the modifications that are in their current property and is required to move in order to free up a modified home for another customer</li> <li>- where a customer requires modifications that are not possible in their current property.</li> </ul> </li> </ul> <p><b>Note:</b>  <i>The previous procedure for Special Event BITs is now captured under this guiding principle.</i>  <i>Where a property is uninhabitable to the point where a customer cannot return to that property, Kāinga Ora will seek to re-house the customer as a BIT</i></p>

	<i>move if another property is available within 10 days. If another property will not be available until after 10 days or longer, then the customer will require a MSD transfer application.</i>
Legal obligations	<ul style="list-style-type: none"> <li>Where a customer's current property is part of a Home Lease Programme (HLP) and a lease expiry notice has been given that requires Kāinga Ora to release the property back to the owner. This is a legal requirement that Kāinga Ora must abide by.</li> </ul>
Enabling housing for future customers	<ul style="list-style-type: none"> <li>Where a customer is required to move from their current property so that <b>redevelopment</b> or other asset related matters can take place (For example, customers are required to vacate to permit works for earthquake strengthening). This may include modification moves which did not fall under the safety and security principle.</li> </ul>
Empowering customers to maintain connections to their communities	<ul style="list-style-type: none"> <li>Where a customer has previously been moved due to a <b>redevelopment</b> and they have accepted the option to be re-housed in the same community as the original property that they were moved from (for redevelopment).</li> <li>Meth rehousing - This is for previous customers who were impacted by the Kāinga Ora zero-tolerance policy relating to meth use prior to 2018. Where the zero-tolerance policy resulted in a previous customer's tenancy being terminated, Kāinga Ora has sought to remedy these past terminations by offering to house these previous customers into available Kāinga Ora properties. This only applies to eligible applicants who were impacted prior to 2018, and is only triggered once an eligible applicant contacts Kāinga Ora and declares that they were impacted by the zero-tolerance policy relating to meth use.</li> </ul>

Other reasons that would not meet the threshold for a high-priority include:

- where a BIT is approved to resolve a community issue, provided all other avenues to resolve the issue have been exhausted (**ASB**)
- where a customer is transferred to another property so that the current property is better utilised (**underutilisation**)
- where overcrowding, characterised as a need for one additional bedroom, has been identified (**overcrowded**)

## Appendix 2: Acceptable reasons to bypass an applicant

The below table outlines guidance on when a bypass is an acceptable course of action.

Bypass reason in Kotahi	Guidance on when this reason may be used to bypass an applicant
Previously bypassed a similar property	<p>An applicant <b>may be bypassed</b> based on the recorded reason for the most recent previous bypass, withdraw, or decline of an available property.</p> <p>However, the following conditions apply before an applicant may be bypassed:</p> <ul style="list-style-type: none"> <li>• the specifications of the available property are approximately the same as the property specifications of the previously bypassed/withdrawn/declined property; and</li> <li>• it has been less than three months since the most recent bypass/withdraw/decline; and</li> <li>• a discussion between Kāinga Ora and the applicant has occurred relating to why the property specifications are not suitable for the applicant.</li> </ul> <p>An applicant <b>cannot be bypassed</b> if:</p> <ul style="list-style-type: none"> <li>• it has been three months or greater since they were last bypassed/withdrawn/declined. The property match process should proceed as the applicant’s personal circumstances may have changed, and they may choose to accept the available property.</li> <li>• there are no clear signs that Kāinga Ora has spoken to the applicant before, or about the reasons why a property is unsuitable for them. This means that there is unlikely to be sufficient, recent information available to determine suitability. The property match should proceed so that Kāinga Ora can engage with the applicant to understand their housing needs, or consider if the reasons for the previous bypass/withdraw/decline are still valid.</li> </ul>
Unsuitable match for area/ neighbourhood	<p>An applicant may no longer be bypassed according to this pre-existing option in Kotahi – all bypass decisions must meet the criteria as stated under ‘Previously bypassed a similar property’ above.</p>

## Appendix 3: Acceptable reasons to withdraw a property match

The below table outlines the different reasons for withdrawing a property match, including guidance on when a property match is, and is not, an acceptable course of action.

The Placement Team has discretion to determine whether the below criteria are reasonably met for each withdrawal reason. However, the Placement Team should look to consult with the applicant or customer before making the decision to withdraw a property match at every appropriate and available opportunity.

Withdrawal reason in Kotahi	Guidance on when this reason may be used to withdraw a property match
Created in error	Use where a match or offer has been created in error. This might include where an error is made while making a manual match.
Unable to contact applicant	Use when a match has been made to an applicant or customer, but Kāinga Ora cannot successfully make contact with the applicant or customer to provide them with an offer.  A withdraw cannot be made unless Kāinga Ora has attempted to contact the applicant or customer at least three times using different methods of communication (call, text, email etc). If contact is unsuccessful, the match may be withdrawn using this reason.
MSD declined match	Use where a system notification (b2b) is received from MSD indicating that the applicant is no longer available to match to a property as the applicant is currently under offer for a property with another social housing provider.  This withdrawal reason applies to the following b2b notification: <b>MSDD</b>
Not on MSD waitlist	Use where a system notification (b2b) is received from MSD indicating that the applicant has been removed from the Social Housing Register. This happens when MSD become aware of a change in the applicant's circumstances that impact on their housing application.  This withdrawal reason applies to the following b2b notification: <b>MSDN</b>
Property offered to BIT applicant with higher need	Use where a customer with a high priority Business Initiated Transfer (BIT) reason has been offered the available property instead of the Social Housing Register applicant.  The current Placement Priority Order in <a href="#">Appendix 1</a> : outlines what BIT reasons are considered high priority for placement compared to applicants from the Social Housing Register.
Customer no longer requires housing	Use when an applicant, before receiving an offer, informs the Placement Team that they no longer require a Kāinga Ora property. This might occur when:

	<ul style="list-style-type: none"> <li>• the applicant has acquired private accommodation; or</li> <li>• the applicant chooses to remain in their current accommodation.</li> </ul> <p><i>Note that if an applicant informs Kāinga Ora that they no longer require a Kāinga Ora property after receiving an offer for an available property, this should be recorded as a decline not a withdraw.</i></p>
Applicant temporarily unable to accept the offer	<p>Use when an applicant is physically or otherwise unable to accept an offer due to a temporary change in circumstances. The property may be held for the applicant on a case by case basis, for a reasonable amount of time, depending on the time frame of the temporary circumstance. In these circumstances, Kāinga Ora must consult with the applicant or customer as appropriate.</p> <p>For example, this withdrawal reason might be used when an applicant:</p> <ul style="list-style-type: none"> <li>• is hospitalised and is expected to be in the hospital for an undetermined amount of time</li> <li>• has custody/remand issues in the process of resolution where the time frame for resolution is undetermined</li> <li>• has sustained an injury or undergone surgery which has resulted in a temporary mobility challenge, and where the property contains stairs etc, and the expected recovery timeframe is undetermined</li> <li>• is required to give 28 days' notice for their current private rental property and this is unable to be negotiated</li> <li>• is intending to move cities/regions to where the available property is located, but there is a delay in the applicant's ability to move, or the move has not yet been organised.</li> </ul>
Incorrect property description	<p>Use when the property is unsuitable for the applicant or customer due to the property details on Kotahi being inaccurate or unspecific. An applicant or customer may have been matched to a property based on the available data, but it is identified throughout the viewing process that the property data is not accurate. This has resulted in the property not meeting the applicant or customer's housing specification needs. In these circumstances, during the property viewing, Kāinga Ora must consult with the applicant or customer before deciding to withdraw.</p> <p>This might occur when:</p> <ul style="list-style-type: none"> <li>• Kotahi has noted that a property has been modified, but upon viewing the property, it is apparent that the modification is not sufficient for the applicant/customer. For example, a property may only have handrails installed in the bathroom, however the applicant/customer requires wheelchair accessibility throughout.</li> <li>• there is limited or missing information about the accessibility of the property on Kotahi. For example, when an applicant/customer requires a flat access property due to old age or mobility challenges,</li> </ul>

	<p>but the property has a steep driveway which makes the property difficult to access.</p> <p><i>Note that if this withdrawal reason is used, then the Placement Team must make a request for the property details to be updated on the system.</i></p>
Property no longer available	<p>Use where a property has been vandalised, significantly damaged, or additional work has been identified which means that the property is no longer available, or that there will be substantial delays before the property is ready to let. There must be consideration of the duration of any delays, and whether the applicant or customer would like to wait for the work to be completed before the property can be withdrawn.</p> <p>For example, this withdrawal reason might be used when:</p> <ul style="list-style-type: none"> <li>• there is a significant maintenance issue that has not yet been entered into the system (eg, discovery of structural damage)</li> <li>• a health and safety issue has been discovered on inspection of a property (eg, discovery of black mould)</li> <li>• methamphetamine contamination has become evident</li> <li>• the property has been significantly damaged due to fire, flood etc.</li> </ul>

Property not suitable for applicant

Note: This withdrawal reason refers to whether a property is unsuitable according to the **physical aspects of the property** – this includes house size, section size, accessibility components, property type (house, apartment etc), or other property specifications. In these circumstances, Kāinga Ora must consult with the applicant or customer as appropriate and where possible before deciding to withdraw.

This withdrawal reason **may be used** to withdraw a property match where the available property:

- would likely endanger the health and safety of the applicant/customer or their whānau. For example, consider if there is a significant safety risk to any children or whānau members with special needs; consider the implications for applicants/customers or whānau who are elderly or have a relevant health condition (not recorded as disability).
- does not reasonably allow for the applicant/customer to have pets. For example, the property does not have adequate outdoor space to accommodate the type and number of pets, in accordance with the Kāinga Ora [POL-306 Policy for Pets](#).
- is considered unsuitable for cultural reasons, such as a property without multiple bathrooms or separate kitchen and living spaces. Where an available property may not meet cultural requirements, the property match should be withdrawn only with the applicant/customer's agreement. Otherwise, the property match should proceed to offer so that the applicant or customer can determine if the property is unsuitable by accepting or declining.

Note that there are some circumstances related to physical property suitability where withdrawing a property match is not an acceptable course of action.

**This withdrawal reason cannot be used where:**

- other Kāinga Ora policies or programmes are in place to mitigate the potential risk to health and safety of applicants/customers or their whānau. For example, a property match cannot be withdrawn based on a whānau with small children being matched to a property without fencing, having a shared driveway, or being too close to a main road. This is because Kāinga Ora have a Driveway Safety Programme in place.
- other Kāinga Ora policies outline how to manage customer property requests. For example, where simple, straightforward accessibility requirements can be reasonably accommodated for in accordance with the Kāinga Ora Accessibility Policy, such as the installation of a hand rail in the shower.



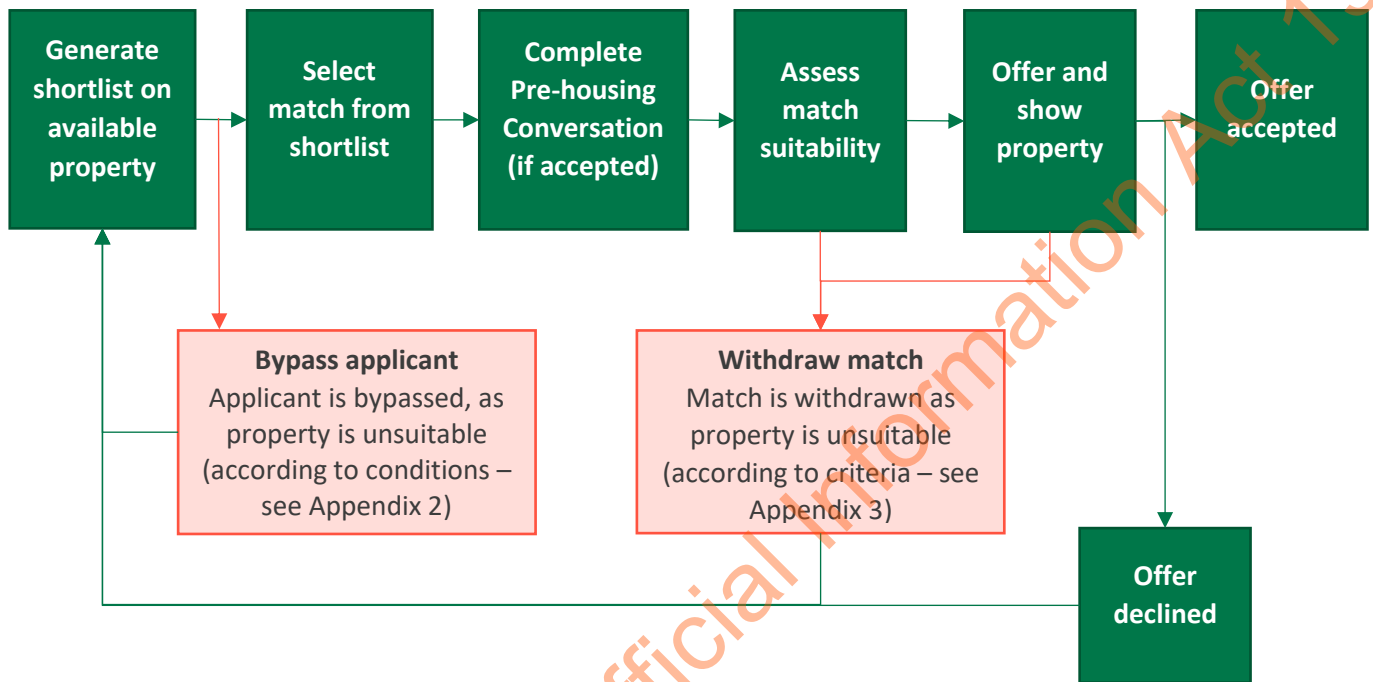
	<ul style="list-style-type: none"> <li>additional information learned about an applicant/customer or their whānau changes their property specification needs/eligibility. For example, a property match cannot be withdrawn if the Placement Team discovers that the applicant/customer now requires an additional bedroom. Kāinga Ora must first confirm eligibility with MSD before considering whether to decline and refer back to MSD, or withdraw the property match.</li> </ul>
Mismatch with neighbourhood	<p>Note: this withdrawal reason refers to whether a property is unsuitable according to the <b>neighbourhood and relational aspects of the immediate community – such as the location of the property and interactions with neighbours.</b></p> <p>This withdrawal reason <b>may be used</b> to withdraw a property match where there is good and justifiable evidence of compelling and sensitive issues that would make the neighbourhood clearly unsuitable for the applicant/customer or their whānau. This means that proceeding with the match is likely to:</p> <ul style="list-style-type: none"> <li>result in significant stress to the applicant/customer or whānau member</li> <li>result in a significant risk to the health and safety of neighbours of the available property</li> <li>cause significant ongoing tenancy management problems/difficulties.</li> </ul> <p>In these circumstances, Kāinga Ora must consult with the applicant or customer as appropriate and where possible before deciding to withdraw.</p>

	<p>Examples of situations where ‘neighbourhood mismatch’ <b>may be used</b> to withdraw a match:</p> <ul style="list-style-type: none"> <li>• an applicant or customer has known, clear and current affiliations with a gang (eg, is an active member of a gang) and the placement would result in the applicant/customer being located on the same street or immediate area where members of a <b>rival gang are also located</b>. Such a placement is unlikely to be a sustainable one for the gang member being placed, and in addition, might place them at risk of harm. If this placement is likely to result in harm to the applicant/customer, other violence, or significant community disruption, then the property match may be withdrawn. <ul style="list-style-type: none"> <li>- <i>Note that it is not acceptable to withdraw a property match based on an applicant having known, clear and current gang affiliations alone. An applicant/customer may be affiliated with a gang in any way they choose without this affiliation affecting their ability to be housed by Kāinga Ora. The decision to withdraw must be related to proximity to a rival gang and the resulting likelihood of harm/violence or community disruption.</i></li> </ul> </li> <li>• an applicant/whānau member has been a recent victim of family violence, and the available property is in an area close to the abuser</li> <li>• an applicant/whānau member presents with exceptionally challenging behaviours (unsafe, physically aggressive or abusive) that present as a significant safety risk to Kāinga Ora staff and/or neighbours.</li> </ul> <p>There must be a good and justifiable reason to withdraw a property match based on neighbourhood mismatch. <b>This withdrawal reason cannot be used where:</b></p> <ul style="list-style-type: none"> <li>• withdrawing the property match does not align with the Kāinga Ora Sustaining Tenancies Framework. This might apply to situations where there are existing Kāinga Ora policies that outline the approach to provide support that addresses the applicant/customer’s needs. For example, a property match cannot be withdrawn based on past complex or disruptive behaviours, mental health or addiction challenges, known poor credit history, or a previous eviction or termination from a Kāinga Ora home. The <u>Sustaining Tenancies Framework</u> outlines our approach to supporting and managing customers with complex behaviours and needs.</li> <li>• an applicant or customer requires wrap-around support to live well, but does not have that support in place prior to placement. The <u>Framework for public housing customers to access social support</u></li> </ul>
--	--

	<p><u>services</u> outlines the role of Kāinga Ora in connecting customers to appropriate support.</p> <ul style="list-style-type: none"><li>• an applicant or customer would be predominantly impacted by a perceived issue or risk, but where this is not a strong enough reason to justify not offering an applicant a house. In these scenarios, applicants and customers should be involved in the decision-making process, rather than Kāinga Ora making a business decision based on a perceived issue without consultation. For example, a property match should not be withdrawn based on:<ul style="list-style-type: none"><li>- the applicant or customer with a young family placed in an area occupied by older tenants (where this is not an elderly person's home)</li><li>- the location of the available property not matching the exact neighbourhood that the applicant/customer has indicated would meet their need</li></ul></li></ul>
--	---

## Appendix 4: Overview of match process

The below diagram depicts a high-level overview of the match process and how key aspects of this policy fit into the match process. For further details and guidance at each step of the below process, refer to [CT-PRO-001 Match applicants and customers to a suitable home](#) and [CT-GDL-006 Guideline for matching applicants and customers to a home](#).



## Guidelines for matching applicants and customers to a suitable home

---

CT-GDL-006

### Table of Contents

<b>1. Introduction.....</b>	<b>3</b>
<b>2. Overview.....</b>	<b>3</b>
<b>3. Our approach to matching an applicant or customer to a home.....</b>	<b>4</b>
3.1 Eligibility .....	4
3.2 Principles for placement priority .....	4
3.2.1 Following the priority order .....	5
3.3 Including applicants and customers in decision making .....	5
3.4 Matching BIT customers.....	6
3.4.1 Special Event BIT.....	6
3.5 Matching Social Housing Register applicants.....	6
3.6 Manual matching .....	7
<b>4. Bypass an applicant.....</b>	<b>7</b>
4.1 Acceptable reasons to bypass an applicant .....	8
<b>5. Advise MSD of match to property .....</b>	<b>9</b>
<b>6. Pre-Housing Conversation.....</b>	<b>10</b>
6.1 Assessing need for another Pre-Housing Conversation.....	11
<b>7. Withdraw a property match .....</b>	<b>12</b>
7.1 Unsuitable due to housing specification needs.....	12
7.2 Unsuitable due to legal requirements .....	13
<b>8. Offer property.....</b>	<b>13</b>
<b>9. View property .....</b>	<b>14</b>
<b>10. Accept offer.....</b>	<b>16</b>

<b>11. Decline offer</b> .....	<b>16</b>
<b>12. Hand over customer information to Senior/Housing Support Manager</b> .....	<b>17</b>
<b>Appendix A: Housing Needs</b> .....	<b>18</b>
Modified properties .....	18
Relocatable homes .....	18
Child sex offenders (CSO) placement.....	19
Probation conditions .....	19
Housing minors (persons under the age of 18 years) .....	19

Released under the Official Information Act 1982

## 1. Introduction

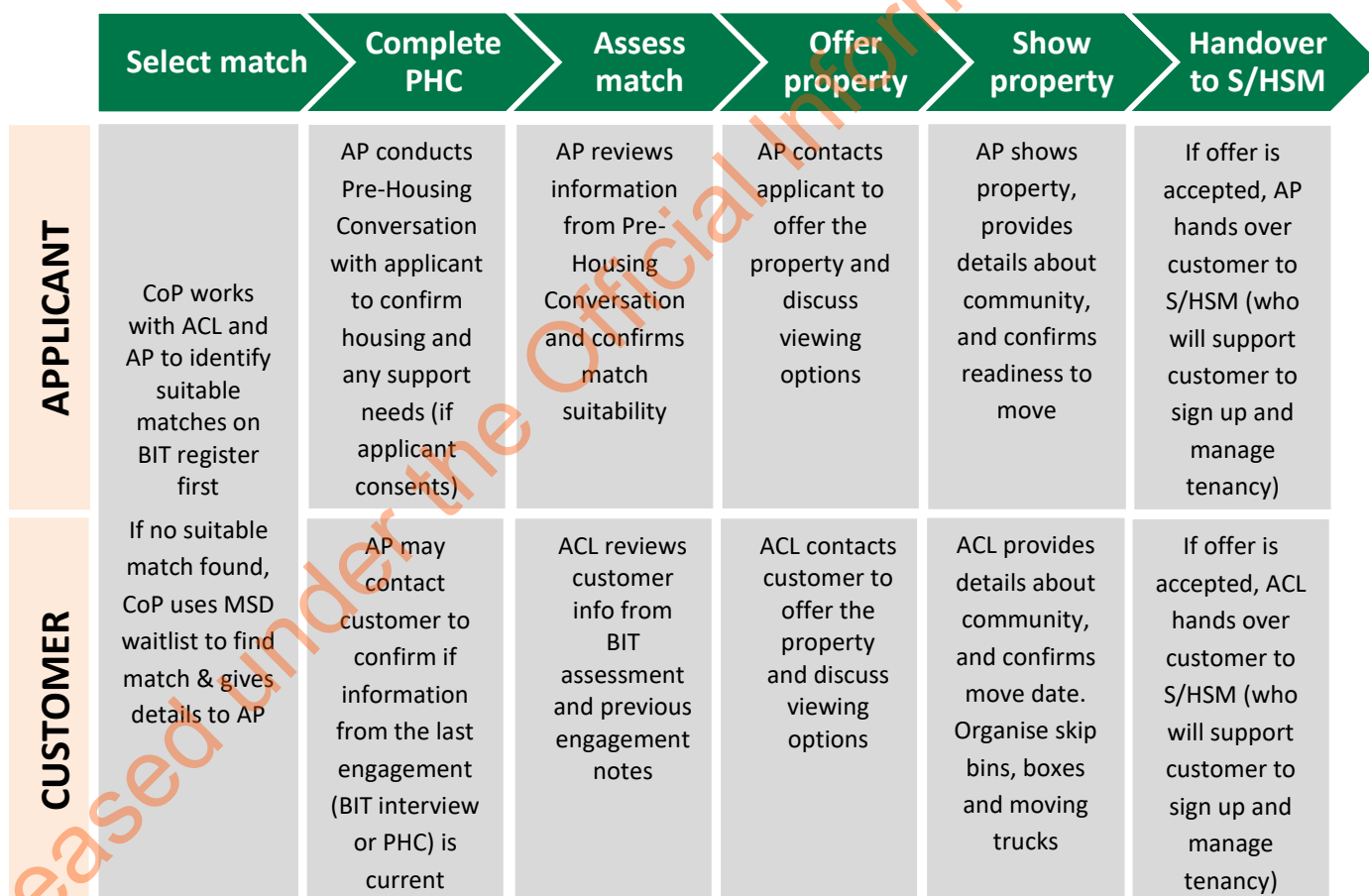
The purpose of this guideline is to help you to match an applicant<sup>1</sup> or customer<sup>2</sup> and their whānau to a home with the aim of creating a sustainable tenancy.

Whānau-centred wellbeing support applies to all our customer interactions and we want our customers to feel confident that we will provide a great home in the right community for them.

This guideline will provide you with the key information needed for each stage in the matching process and should be read with process CT-PRO-001 Match applicants and customers to a suitable home.

## 2. Overview

The following diagram shows an overview of the matching and placement process for applicants and customers.



**Key:**

Coordinator Placement (CoP); Advisor Placement (AP); Advisor Customer Liaison (ACL); Senior/Housing Support Manager (S/HSM); Pre-Housing Conversation (PHC)

<sup>1</sup> An applicant is a person on the MSD Social Housing Register who may be considered for a Kāinga Ora property, but is not yet a Kāinga Ora customer.

<sup>2</sup> A customer is a person who is a tenant of a Kāinga Ora property.

### 3. Our approach to matching an applicant or customer to a home

Management, prioritisation and allocation of social housing is shared between the Ministry of Social Development (MSD) and Kāinga Ora – Homes and Communities (Kāinga Ora).

MSD is responsible for assessing an applicant's eligibility and setting the priority order that applicants on the Social Housing Register (SHR) must be placed according to.

We are responsible for matching applicants from the SHR, and existing customers from the Business Initiated Transfer (BIT) register, to a Kāinga Ora home according to placement priority. For more details, see [Principles for placement priority](#).

We have a limited ability to determine what 'suitable' looks like for an applicant or customer. This is limited due to what MSD is responsible for under the Public and Community House Management Act 1992 and the agreement we have with Ministry of Housing and Urban Development (MHUD).

When we make placement decisions, we have to follow the principles for placement priority. We also have to base our decisions on what the applicant/customer is [eligible for](#).

However, there are circumstances where we make housing available to, or prioritise a specific type of housing for applicants or customers with certain needs. For more details, see [Appendix A](#).

#### 3.1 Eligibility

What an applicant/customer is eligible for is based on their housing specification needs (eg, bedroom number, letting area, accessibility requirements etc).

MSD is responsible for determining an applicant/customer's eligibility.

#### 3.2 Principles for placement priority

Placement priority is the order in which we match applicants or customers to a property. Priority is determined by applying the four principles of:

1. safety and security
2. legal obligations
3. enabling housing for future customers
4. empowering customers to maintain connections to their communities.

To be considered a high priority BIT customer, the BIT must be necessary to meet one of the four principles above. For a full description of these principles, and examples of situations that align with high priority BITs, refer to Appendix 1 of Policy: Match to a Suitable Home policy (POL-354).



### 3.2.1 Following the priority order

When making decisions about who to match, we must continue to follow the placement priority order. This means that:

- A high priority BIT customer is considered for an available property first
- A Social Housing Register applicant is considered for an available property if there are no high priority BIT customers, or the property is not suitable for a high priority BIT customer
- Remaining (non-high priority) BIT customers may be considered for an available property if the property is not suitable for an applicant on the Social Housing Register.

**Note:** For details about how we determine whether a property is unsuitable, see section [4](#) Bypass an applicant and section [7](#) Withdraw a property match.

### 3.3 Including applicants and customers in decision making

We want applicants and customers to be involved in determining when a property is suitable for them. Therefore, we will not consider a property unsuitable based on factors such as being too far away from a school or public transport, without having a discussion with the applicant or customer first.

Instead, if the property specifications (bedroom number, letting area, accessibility needs, etc) are suitable for the applicant or customer, we will proceed with the offer and viewing stage of the process. This is to enable the applicant or customer to decide whether the property is suitable for their needs at that point of time.

We take this approach because we do not know when an applicant/customer might decide that having a home is the most important thing to them at that point in time. We want to give applicants/customers more chances to accept a property so that we remain responsive to any changing circumstances that an applicant or customer might be facing.

The key thing is to talk with the applicant or customer as much as you can. If an available property appears to be suitable, but may not meet all of the applicant/customer's needs, discuss this with the applicant/customer wherever possible. The aim is to collaboratively explore solutions and determine suitability in line with property specification needs.

**Note:**

Your ability to freely discuss the exact details of the available property will be dependent on the stage of the process that you are in.

- During the **'complete PHC'** or the **'assess match'** stages, the property being considered may still be tenanted and notice to vacate can be revoked by the current tenant. Therefore, we should not tell the applicant/customer that they are being considered for a property that is potentially becoming available. Instead, you can ask questions about certain property characteristics more generally to seek their views.
- If you are in the **'offer property'** or **'show property'** stages, then you can freely discuss all details of the property with the applicant/customer because they have received an offer.

### 3.4 Matching BIT customers

We are responsible for matching existing customers from the Business Initiated Transfer (BIT) list to alternative Kāinga Ora homes.

High priority BIT customers are considered for available properties first. This ensures we meet the housing needs of customers whose tenancies have been affected by business decisions. High priority customers on the BIT list are those who require a BIT move to meet one of the four principles outlined in Appendix 1 of Policy: Match to a Suitable Home policy (POL-354).

When checking for high priority BIT customers, a list is generated against the BIT register using the property address. Kotahi will select the customers that match the letting area, bedrooms required, and any specific characteristics such as modifications if required.

If no high priority BIT customers are available, or where the available property is unsuitable for a high priority BIT customer, then the property will be matched to the highest priority applicant on the MSD Social Housing Register.

Applicants on the Social Housing Register will be given priority over remaining (non-high priority) BIT customers.

#### 3.4.1 Special Event BIT

A 'Special Event' BIT move may be considered if a move is extremely urgent. This BIT move is generally captured under the 'safety and security' guiding principle for placement priority.

A 'Special Event' may be considered where there is a significant risk to the customer and their whānau, and a property has already been identified and will be available within the next 10 working days.

Approval for a 'Special Event' must be sought from and granted by a Manager Regional Placement. If a 'Special Event' is approved, then it is considered the highest priority for placement.

### 3.5 Matching Social Housing Register applicants

We are also responsible for matching applicants from the Social Housing Register to an available Kāinga Ora home.

When a property becomes available, MSD provides us with a shortlist of applicants whose housing specification requirements match the specifications of the property. Kotahi selects the highest priority applicant who best matches to the available property according to letting area, bedrooms required, and any specific characteristics such as modifications if required.

When an MSD shortlist is generated, information about the applicant, their household, and housing needs becomes available to view.

**Note:** The MSD shortlist includes any known risk factors; for example, probation conditions.

### 3.6 Manual matching

Manual matching should be used sparingly, and only for limited circumstances that have been approved. It should not be used as a regular method for matching applicants. This is because we have an obligation to match the highest priority applicants first, and undertaking a manual match does not necessarily meet that obligation.

If you are seeking a manual match, you need to speak to a Manager Regional Placement and provide a reason for the manual match:

- The Manager Regional Placement will discuss the request with the delegated Manager Regional Placement for your region
- The delegated Manager Regional Placement has discretion to decide whether a manual match would be an appropriate course of action for the situation. If they agree that a manual match is appropriate, then they will make the request via the Interagency Team (who will contact MSD).

Note that a Manager Regional Placement must request and receive approval from MSD (via Interagency Team) before a manual match may be actioned. Once approval has been received, then the process outlined in CT-PRO-001 Match applicants and customers to a suitable home is triggered.

Some acceptable manual match circumstances might include:

- When there is a death of a sole tenant (that is, the only signatory to the tenancy). In this instance, we might manually match an eligible household member so that they do not have to move out.
- When an applicant has declined a property offer, but contacts us soon after the decline as they have changed their mind and want to now accept the property.
- When an applicant is experiencing critical negative health and wellbeing effects due to their current living arrangements and this requires immediate action to avoid death or disability.

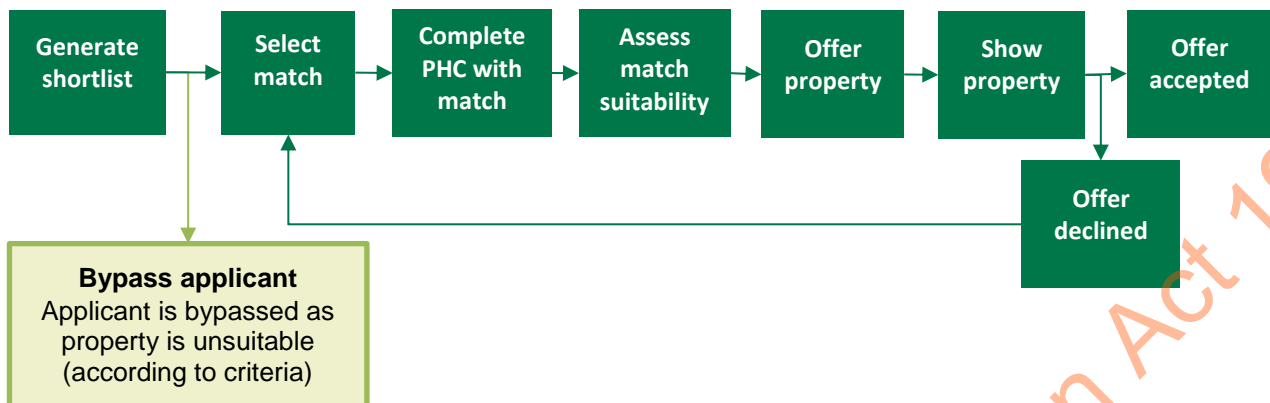
MSD sometimes approaches us to request that we urgently match an applicant to a property via manual match. If this happens, we first need to identify if there is a suitable property available. We cannot complete a manual match if no properties are available.

## 4. Bypass an applicant

A bypass can be actioned after generating the Social Housing Register shortlist for the available property, and before a recommended match is made.

When reviewing the Social Housing Register shortlist, if the available property is not suitable for the highest priority applicant then the Coordinator Placement may bypass the applicant so that the property can be matched to the next highest priority applicant.

See the diagram below for a representation of when a bypass may occur in the process.



A bypass should only occur under limited circumstances. Therefore, only consider bypassing the highest priority applicant if the property is clearly unsuitable for a significant or justifiable reason.

If you are considering a bypass, you first need to check Kotahi to see if the applicant has a previous withdraw or decline (and a clear reason for the withdraw/decline) recorded.

- If the applicant **does not** have a recorded previous bypass, withdraw or decline, then proceed with the match and pass the match on to the next stage of the process.
- If the applicant **does have** a recorded previous bypass, withdraw or decline, then look at recent information that is available for the applicant (such as their Pre-Housing Conversation (PHC) or requirements in their Social Housing Register application) and use section below to decide if the applicant may be bypassed.

#### 4.1 Acceptable reasons to bypass an applicant

An applicant can only be bypassed from an available property based on the recorded reason for the most recent previous bypass, withdraw, or decline. Before a bypass can be actioned, all of the below conditions have to be met:

- The current property has to be approximately the same as the property that was most recently bypassed/withdrawn/declined. For example, it must have the same number of bedrooms or be the same property type.
- It has to be less than three months since the most recent bypass/withdraw/decline.
- It is clear from notes on Kotahi that we have spoken with the applicant about why they declined the most recent available property, or why the most recent available property was unsuitable (resulting in a withdraw).

##### Notes:

- If the bypass conditions above have not been met, the Coordinator Placement should proceed with the match and pass the applicant on to the next stage of the process. For example, if it was more than three months since the most recent bypass/withdraw/decline, the Coordinator Placement cannot bypass the applicant again.

Instead, they should match the applicant and pass the match on to the Advisor Placement so that we engage with the applicant again. Kotahi should be updated on any change in the applicant's circumstances or reasons why a property is unsuitable.

- It is important that any information used to determine a bypass is recent. For example, if the Pre-Housing Conversation was completed or updated within the last three months, then that information is likely recent enough to support making a decision.

For more detail on the acceptable bypass reasons and the conditions that must be met, see operational Policy: Match to a Suitable Home policy (POL-354), Appendix 2 – Acceptable reasons to bypass an applicant.

#### **Example scenario**

In June, an applicant who owns five dogs appeared as the highest priority applicant for a currently available two-bedroom property that can only reasonably accommodate two dogs.

Records show that in May, the applicant was offered a previously available two-bedroom property that could also only reasonably accommodate two dogs. However, the applicant decided to decline the offer as they wanted to keep all five dogs.

During the decline offer stage, we asked the applicant if they would be willing to part with any of their dogs in order to live in a home that could not accommodate all five dogs. The applicant said no. We asked the applicant if their decision will be the same for future similar properties and the applicant said they are prepared to be bypassed for other similar properties that cannot accommodate all five dogs.

June is the first time the applicant has appeared for another available property since their most recent decline in May. This applicant may be bypassed for the currently available property because:

- the properties are similar
- it has less than three months since the most recent decline
- we have spoken with the applicant about their needs.

## **5. Advise MSD of match to property**

The Coordinator Placement informs MSD when an applicant from the MSD social housing register is matched to a property. This is an automated system process using Kotahi. MSD will confirm whether the applicant is still on the MSD social housing register.

- If the applicant is still on the MSD register, MSD will provide contact details, income related rent (IRR) amount, and also confirm if the applicant has applied for payment of rent in advance and it is approved.
- If the applicant does not have access to assistance from MSD for rent in advance, the Advisor Placement will need to discuss payment options with the applicant.

## 6. Pre-Housing Conversation

The Pre-Housing Conversation helps us to further understand the housing needs of an applicant and their whānau. It also helps us to identify any support that they might need to move and successfully settle-in and live well in their new home.

The Pre-Housing Conversation is optional. We should explain the purpose of the conversation and let the applicant know that participation in the Pre-Housing Conversation is optional, and not partaking will not affect their chance of being housed. However, we should encourage the applicant to take part because it will help us to make the best match to a home.

If an applicant does not want to have a Pre-Housing Conversation, it will not prevent them from being housed. We will use information available from MSD (refer to T-365 MSD applicant summary form) and Kotahi to assess the match.

See Guidelines on completing the Pre-Housing Conversation (CT-GDL-011)

**Note:** The Pre-Housing Conversation is not an opportunity to re-assess or verify the applicant's eligibility for social housing.

A Pre-Housing Conversation does not guarantee that we have a home for an applicant.

- An applicant should not be notified of a property match until the property status is at CONFVOID and the property is vacant.
- When undertaking a Pre-Housing Conversation, we should not indicate to the applicant that they are being considered for a property that is potentially becoming available.
- It is up to each office to decide where and how they wish to meet the applicant or customer safely. Below are some options to consider. See Guideline for Staying Safe and Secure (SS-GDL-110); Customer Visits Guidelines, and if necessary, Manage Customer Risk Rating.

	Settings	Options and considerations
<b>Suitable places for the PHC to take place</b>	Controlled access locations	<ul style="list-style-type: none"> <li>• In a Kāinga Ora office</li> <li>• Community Link (co-location with other agencies)</li> <li>• Transitional housing provider</li> </ul>
<b>Distance to travel</b>	Rural or remote areas	<ul style="list-style-type: none"> <li>• How long is too long distance to travel</li> <li>• Number of PHC that could be arranged for the same day to make the trip more feasible</li> <li>• Going in pairs where necessary according to H/S guidelines (enter appropriate link)</li> <li>• Is the customer comfortable with having the conversation over the phone</li> </ul>

Before the conversation, the Advisor Placement will:

- contact the applicant/customer to arrange a suitable date, time and location
- decide the best place for the Pre-Housing Conversation. The best place may be a compromise of what is best for the applicant/customer and what is practical, taking into account safety, distance, whether they can make it (For more detail, see Guideline for meeting housing applicant/customers)
- find out if the applicant/customer would like to bring a support person (whānau or support service they are currently receiving support from)

At the meeting:

- explain the purpose of the Pre-Housing Conversation
- read the Pre-Housing Conversation Privacy Statement (CT-FRM-007) and get the applicant's consent to proceed with the assessment
- get the applicant to sign the form if conversation is face to face (if by phone, the Advisor Placement can tick the form to confirm agreement)
- confirm letting areas
  - discuss our pet policy if applicable (see Managing pets (CT-773))
  - discuss short and long term housing goals
  - identify supports that may be needed to sustain a tenancy
  - tell the applicant/customer what happens next

**Note:**

- We can only use information collected during the Pre-Housing Conversation for the purpose of confirming a housing match and to identify the tenancy support service level the applicant/customer and their whānau may require from us, once housed.
- For BIT customers, the Advisor Customer Liaison will have already met with any customer who is on the BIT register and have a good understanding of their needs. See Kāinga Ora Business Initiated Transfer Interview Sheet (T-474). However, if it has been 3 months since the last engagement (BIT interview or a PHC) we should make contact with the customer to see if circumstances are the same.

## 6.1 Assessing need for another Pre-Housing Conversation

If a Pre-Housing Conversation was completed before, we will not complete another full Pre-Housing Conversation unless we do not have sufficient or current information available to support the placement decisions.

First, check the previous Pre-Housing Conversation information to assess the available information. If there is enough information available to make a good and informed placement decision, and that information is recent, then proceed.

If there is critical information missing, or if it has been a long time since the Pre-Housing Conversation was completed (eg, greater than 3 months), then contact the applicant.

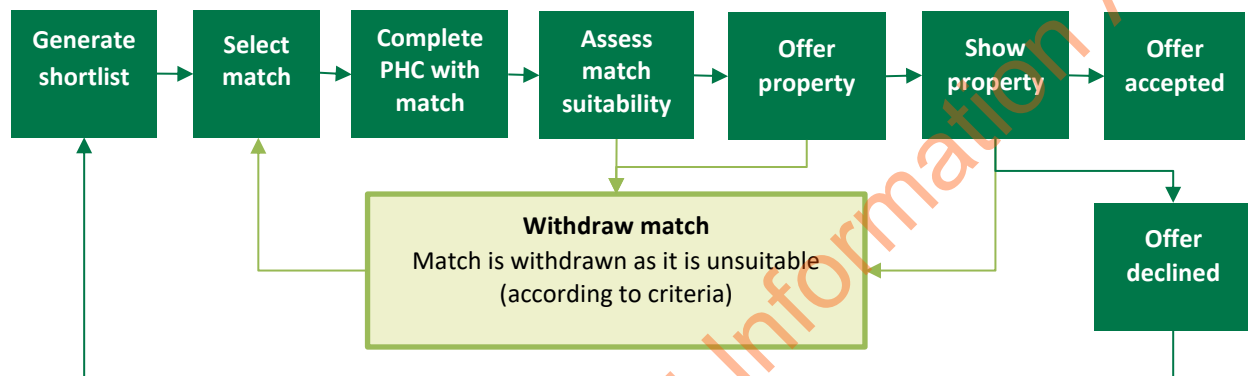
Rather than undertaking a full Pre-Housing Conversation, give the applicant a call and check if their circumstances have changed since the Pre-Housing Conversation was completed.

The Advisor Placement will contact applicants to determine if there is a change in circumstance and how detailed any future Pre-Housing Conversation needs to be.

**Note:** The applicant can choose to have a new Pre-Housing Conversation.

## 7. Withdraw a property match

A match can be withdrawn at any time during the assess/offer/show property stages of the process, as shown in the following diagram.



A match can only be withdrawn if the property is unsuitable for the applicant or customer. A property match can be considered unsuitable on two grounds:

- The property is [unsuitable based on the applicant/customer's housing specification needs](#) against the specifications of the available property.
- The property is [unsuitable due to legal requirements](#).

The Advisor Placement should refer to the below sub-sections when deciding whether a match can be withdrawn. When a decision is reached, this decision is passed on to the Coordinator Placement to action in Kotahi.

If the Advisor Placement notifies the Coordinator Placement that a match is unsuitable and is to be withdrawn, and the Coordinator Placement does not agree with this decision, both roles should discuss the match and come to an agreement.

If the Advisor Placement and the Coordinator Placement cannot reach an agreement about the match's suitability, they should escalate these concerns to the Manager Regional Placement to make a decision. The Manager Regional Placement may consult with the Manager Housing and Wellbeing Support, if required.

### 7.1 Unsuitable due to housing specification needs

If you think that a property match is unsuitable because it may not meet the applicant/customer's housing specification needs, you must check the criteria outlined in the operational Policy: Match to a suitable home (POL-354), Appendix 3 – Acceptable



reasons to withdraw a property match to see if any of the acceptable reasons to withdraw apply.

If the property match meets one of the acceptable reasons outlined in the operational policy criteria, then the Advisor Placement may choose to withdraw the property match and clearly record appropriately detailed notes on the reasons for the withdraw.

However, the property match does not always have to be withdrawn if it meets one of the acceptable reasons outlined in the operational policy. The property match may proceed, for example, if the applicant or customer indicates that they still want the property.

**Note:** it is best practice to include the applicant/customer in decision making as much as possible. This means talking with the applicant about why a property might be unsuitable as much as you can. Refer to section [3.3 Including applicants and customers in decision making](#).

After a property match has been withdrawn and notes recorded, the Advisor Placement can consider the next highest priority applicant or customer for the available property.

## 7.2 Unsuitable due to legal requirements

There are some circumstances where we have to withdraw a property match because the applicant or customer has to meet legal requirements around where they can live. A property is considered unsuitable according to legal requirements if placing the applicant/customer in the available property would:

- result in a violation of their probation conditions; or
- result in a violation of the requirements for placing child sex offenders (refer to Child Sex Offenders - Recording and Placement (CT-PRO-301)); or
- result in an applicant/customer being in close proximity to a person protected from the applicant/customer by a restraining order or protection order.

Under these circumstances, the Advisor Placement does not have discretion to decide whether the match should be withdrawn – the property match must be withdrawn.

**Note:** Once a property match has been withdrawn and notes recorded, the Advisor Placement can consider the next highest priority applicant or customer for the available property.

## 8. Offer property

When the match has been approved, the Advisor Placement contacts the applicant (or Advisor Customer Liaison contacts the BIT customer) to make the offer and provide key information, including:

- that any offer including the amount of rent payable is subject to review if there is any change in circumstances before sign up
- any special tenancy conditions i.e., body corporate rules
- when the property is expected to be ready
- the rent amount

- the rent in advance required and whether this has been pre-approved by MSD
- the different viewing options
- if the offer is subject to probation (that is, Corrections) approval
- if the offer is conditional upon Tribunal approval in the case of a minor
- the suitability for pets, if applicable. See Managing pets (CT-773)
- property details, for example:
  - if the property is fully fenced
  - what sort of heating is provided (for example, heatpump, panel heater, log burner, gas heater)
  - what sort of cooking is provided (for example, gas or electric)
  - if the property is an apartment, is there a lift or only stairs
  - if there are any modifications (for example, ramp access or if the bathroom has been modified)
  - if there is carpet/wooden/lino flooring and curtains
  - general details about the neighbourhood – local schools, public transport, doctors, etc

The customer must be advised that any offer outcome (acceptance or decline with reasons) will be communicated to MSD.

Advisor Placement or Advisor Customer Liaison will provide applicant/customer with a clear and reasonable timeframe for applicant/customer to provide their offer response by. When setting this timeframe, ensure it includes property viewing and working days (not weekends).

During the offer process, if the applicant/customer advises their circumstances and/or housing requirements have changed:

- the Advisor Placement will need to advise the applicant/customer that the offer must be put on hold
- the Coordinator Placement will advise MSD (with the applicant's consent) that a change has occurred
- the applicant/customer must be advised MSD will be in contact within the following 24 hours to discuss the change, and they therefore need to be contactable.

If there is a change to the applicant/customer's rating or eligibility, MSD will advise us.

## 9. View property

When the Advisor Placement identifies a property match, the applicant/customer will be offered an opportunity to view the home.

Viewings allow us the opportunity to provide the applicant/customer with further information about the property's features. This includes identifying whether any maintenance work is scheduled to take place, and giving further details about the surrounding area and community.

**Note:** Any health and safety risks must be flagged to all our people, including contractors who may be working on a property. See also Guideline for staying safe and secure (SS-GDL-110); and, if necessary, Manage Customer Risk Rating.

### **Provide viewing options**

We try to give the applicant/customer different options to view the property so they can choose which one works best; for example, we can offer:

- viewing the property in person
- driving past the property
- viewing photos via email or in one of our offices. (**Note:** When providing photos, ensure that we do not breach the neighbours' privacy).

In areas where there are Void Specialists, the Placement Team will need to work with them to decide if there is an opportunity to conduct a viewing at the property during the VOID process or after the expected completion date.

The Advisor Placement or Advisor Customer Liaison will arrange a time that works for both the applicant/customer and Kāinga Ora. A support person is encouraged to attend a viewing, at the applicant/customer's request.

The Void Specialist will be responsible for expectations of what will be done to the home, and the Placement Team will be there to understand any support the customer may need for the move.

In areas where there are no Void Specialists, the Advisor Placement/Advisor Customer Liaison can:

- conduct the viewing using information available in Kotahi to provide details about any property work still to be done and the completion date; or
- offer other viewing options mentioned above.

### **Safety considerations for viewing**

When arranging a viewing, the Advisor Placement should assess the risks and create a safe work plan if required. For more details, see:

- [Safework Plan Guidelines](#)
- Manage customer risk register
- SS-GDL-110 Staying Safe and Secure

During the viewing discuss community characteristics, provide information about the neighbourhood and be prepared to answer any additional questions.

### **When applicant/customer does not choose to view property**

Sometimes, an applicant/customer may choose not to view a property before accepting an offer. If this occurs, the most recent photos from the pre-let or final inspection must be made available to these applicants/customers.

## 10. Accept offer

The applicant/customer must tell us that they accept the property within the set reasonable timeframe mentioned under section 8: [Offer property](#).

The applicant/customer must contact the Advisor Placement or Customer Service Centre to communicate their decision to accept or decline the property. Customer Support Advisor contacts Advisor Placement or Customer Liaison Advisor to let them know the applicant/customer's decision.

When the applicant/customer accepts the property, the Advisor Placement/Customer Liaison Advisor will inform the applicant/customer what happens next.

If Kāinga Ora does not hear back from the applicant/customer within the set timeframe, we will take all reasonable steps to contact the applicant/customer to confirm their acceptance of the property (using a range of communication methods, for example calling, emailing, texting). If we cannot make contact after the set timeframe and all reasonable attempts have been made, then treat the offer as declined.

When the applicant/customer accepts the property, the Advisor Placement will:

- work with the applicant/customer to understand the support they need for the move and refer the applicant/customer to MSD or other support agencies if needed;
- with consent, continue to connect with support providers the customer may be engaged with to support a smooth transition into their new Kāinga Ora home.
- ask if they would like to get a link or electronic copy of the [Guide to understanding your Tenancy Agreement](#) sent to them by email or phone text. Explain the guideline will:
  - help them understand what's needed before they meet their Housing Support Manager for sign-up.
  - have a link to [Welcome to Your Home](#) video that they can check out. If they prefer to only get the video link, send it to them.

**Note:** If the customer prefers, you can also forward a copy of the guideline by email. If our external website is unavailable, you can get a copy of the Guide to understanding your Tenancy Agreement in Atamai.

## 11. Decline offer

When the applicant/customer declines an offer, we need to discuss their reasons for declining the property. This is because we need to record a reason in Kotahi for why the applicant or customer declined.

**Note:** There are some circumstances where it may be appropriate to withdraw a property match rather than decline (refer to the acceptable reasons noted in section 7: [Withdraw a property match](#)). For example, if you find out during the viewing stage that the property will not meet an applicant or customer's accessibility needs. However, a withdrawal should not be used in place of, or to avoid, a decline. This is because a decline serves an important function of notifying MSD of why a property was unsuitable for an applicant.

Reasonable reasons for decline can include some of the following:

- distance from public transport
- distance from essential services
- parking inadequate
- not suitable for cultural reasons
- unsafe community

**Note:** is it not our responsibility to determine whether the reason for declining a property is acceptable. MSD will determine whether decline reasons are acceptable. Our main responsibility in this situation is to record the reason that the applicant or customer provides.

The Advisor Placement must also ask the applicant who declined the offer if they are happy to be bypassed from similar available properties in the future based on the reason why they have declined the current property. If they indicate that they do not want to be bypassed for similar available properties in the future, then leave clear notes not to bypass the applicant in the future based on their decline reason.

The Advisor Placement must tell the applicant that MSD will review their application and notify them directly of any outcome.

MSD will review all declined offers from Social Housing Register applicants and they will notify the applicant directly of the outcome.

Where a Kāinga Ora customer on the BIT register declines an offer, the Coordinator Placement will record the reasons for decline.

## 12. Hand over customer information to Senior/Housing Support Manager

Once the applicant/customer has accepted a property, a handover will take place with the Advisor Placement and the allocated Senior / Housing Support Manager. To ensure the customer doesn't need to repeat their story and continuity of care or plan is in place, the Advisor Placement will advise the Senior / Housing Support Manager the following:

- Support customer already engaged with
- Support the customer needs in the home and other support needs
- Any referrals sent to service providers

**Note:** It is up to the Regional teams to decide the best way to conduct the hand-over process. This must be done within 48 hours after the applicant/customer's decision to accept the property.

## Appendix A: Housing Needs

This section provides more details about some of the housing needs that may affect placement priorities of our applicants/customers.

### Modified properties

If a vacant property is modified it must be offered firstly to any applicant/customer who needs a property with those modifications. Placement priority still applies.

The Advisor Customer Liaison may have a suitable special event transfer or customer from the BIT register who needs a property with modifications, they should check with their appropriate manager to proceed with the match.

If no manual request is received, include restrictions when generating a shortlist in Kotahi. This will prioritise those applicants/customers who MSD identified as needing a modified property during the Needs Assessment.

If an applicant/customer needs a modified property, their occupational therapist may need to determine if the property is suitable. If this is necessary, it should be noted by MSD and captured in the information provided in the social housing register to assist with placement.

If the occupational therapist determines that the property is not suitable this must be recorded as a 'withdrawal' not a 'decline'.

If no applicant/customer can be found who needs a modified property, we can consider other priority applicants who do not need a modified property. If a property is accepted by an applicant/customer who does not need the modifications, they may be required to move if this property is identified as a more suitable match by another applicant who does need the modifications. We need to ensure we inform the applicant/customer and they understand this at sign-up.

**Note:** Customers who require modified housing during their tenancy may be considered for a business initiated transfer if it is not possible or desirable to modify their current property.

### Relocatable homes

We have some homes sited on land not owned by Kāinga Ora. These properties are primarily sited on multiply-owned Māori land, and we have a licence to occupy. In some cases, as part of the condition of this licence, any placement of an applicant/customer into these homes must be approved by the Trustee/owners of the land. While we would not enter into this kind of arrangement today, as it does not align with our legal obligations in relation to placement, they have been agreed and are still in force.

The Regional Manager Placement will:

- request a manual match if there are specific licence conditions which must be considered;
- confirm that the normal matching process can proceed.

When there are specific licence conditions, the Regional Manager Placement and/or Maori Land Lease Manager will contact the trustees/owners to see if they have any prospective customers for the property and obtain contact details. Any prospective customer must be an eligible applicant/customer from the BIT or MSD registers. With the consent of the applicant/customer, the Regional Manager Placement will email the Interagency Team to obtain the application reference number or request an urgent needs assessment appointment with MSD if there is no current application for the prospective customer.

If the Trustee/owners are unable to provide us with a recommendation of an eligible applicant/customer, then Kāinga Ora will advise the Trustee/owners that our normal matching process from either the Kāinga Ora BIT register and/or the MSD social housing register will proceed.

### **Child sex offenders (CSO) placement**

See Child Sex Offenders - Recording and Placement (CT-PRO-301).

### **Probation conditions**

If an applicant/customer is subject to probation conditions, their probation officer may need to determine if the property is suitable and formally sign off any offer before placement can proceed. If the tenancy is subject to this condition, it will be included in the information provided by MSD.

For child sex offenders, see Child Sex Offenders - Recording and Placement (CT-PRO-301)

If the probation officer determines that the property is not suitable this must be recorded as a 'withdrawal' not a 'decline'.

### **Housing minors (persons under the age of 18 years)**

See Tenancy Management guidelines

## Match applicants and customers to a suitable home

CT-PRO-001

### Table of Contents

<b>1. Process overview</b>	<b>2</b>
1.1 Introduction	2
1.2 Purpose and scope	2
<b>2. Policy and Legislation</b>	<b>3</b>
2.1 Policy Summary	3
2.2 Legislation	3
<b>3. Definitions</b>	<b>3</b>
<b>4. Process map</b>	<b>5</b>
<b>5. Procedures</b>	<b>6</b>
5.1 Select suitable match	6
5.2 Carry out Pre-housing conversation and confirm any support needs	10
5.3 Review match suitability for property	12
5.4 Offer property	15
5.5 Show property	17
5.6 Process offer response	19
5.7 Hand over applicant/customer information to Senior/Housing Support Manager	22
<b>6. Supporting information</b>	<b>23</b>
<b>7. System steps</b>	<b>24</b>
7.1 Kotahi steps	24
7.2 Information Delivery Portal (IDP) reporting	26
<b>8. Document control</b>	<b>28</b>



# 1. Process overview

## 1.1 Introduction

Management, prioritisation and allocation of social housing is shared between the Ministry of Social Development (MSD) and Kāinga Ora – Homes and Communities (Kāinga Ora). MSD identifies an applicant's housing requirements as part of their needs assessment, determines an applicant's priority rating, and manages the Social Housing Register (SHR).

Kāinga Ora is responsible for matching applicants from the Social Housing Register, and customers from the Business Initiated Transfer Register (BIT), to a suitable Kāinga Ora home according to placement priority.

We do our best to match an applicant/customer to a property based on available information and conversations with the applicant/customer, so that when offering a property, both Kāinga Ora and the applicant or whānau are satisfied that the tenancy will be sustainable.

## 1.2 Purpose and scope

The purpose of this business process is to:

- match an applicant or customer to a suitable home
- offer a suitable home to an applicant or customer
- record the outcome of any offer made

**Note:**

This process must be used in conjunction with Guideline for matching applicants and customers to a suitable home (CT-GDL-006).

## 2. Policy and Legislation

### 2.1 Policy Summary

Our policy and procedures support Kāinga Ora to understand the needs of applicants from the Social Housing Register or transferring customers from the Business Initiated Transfer Register so that we can achieve a sustainable housing match. Placement decisions must balance the aim of achieving a sustainable match against our obligations to allocate homes fairly, transparently and on the basis of need.

For any questions on policy, please refer to Policy: Matching to a Suitable Home in the first instance. For any outstanding questions, contact the Operational Policy Team.

### 2.2 Legislation

- [Public and Community Housing Management Act 1992](#)
- [Residential Tenancies Act \(RTA\) 1986](#)
- [Minors' Contracts Act 1969](#)
- [Privacy Act 2020](#)
- [Health and Safety at Work Act 2015](#)
- [Kāinga Ora–Homes and Communities Act 2019](#)
- [Treaty of Waitangi](#)

## 3. Definitions

**Applicant** - a person who is eligible for social housing and is yet to be housed by a social housing provider (i.e., an individual on the Social Housing Register). For the purpose of this document, an applicant refers to a person who may be considered for a Kāinga Ora property, but is not yet a Kāinga Ora customer.

**Business Initiated Transfer (BIT)** - if we need a customer to move out of the property they are currently renting for business reasons, they are placed on the Kāinga Ora Business Initiated Transfer (BIT) Register.

**Bypass** – A system response in Kotahi where, if the available Kāinga Ora property is unsuitable for the highest priority applicant, they are bypassed so that the next highest priority applicant is considered instead.

**Customer** - a person who is a tenant of a Kāinga Ora property and anyone living at the property with the tenant's permission.

**Placement priority** - determines the priority in which applicants or customers may be matched to available properties. For more information on the placement priorities, see Policy: Match to a Suitable Home (POL-354).

**Shortlist** - list of applicants on the BIT transfer and MSD Social Housing Register who have been matched to a Kāinga Ora property by Kotahi.

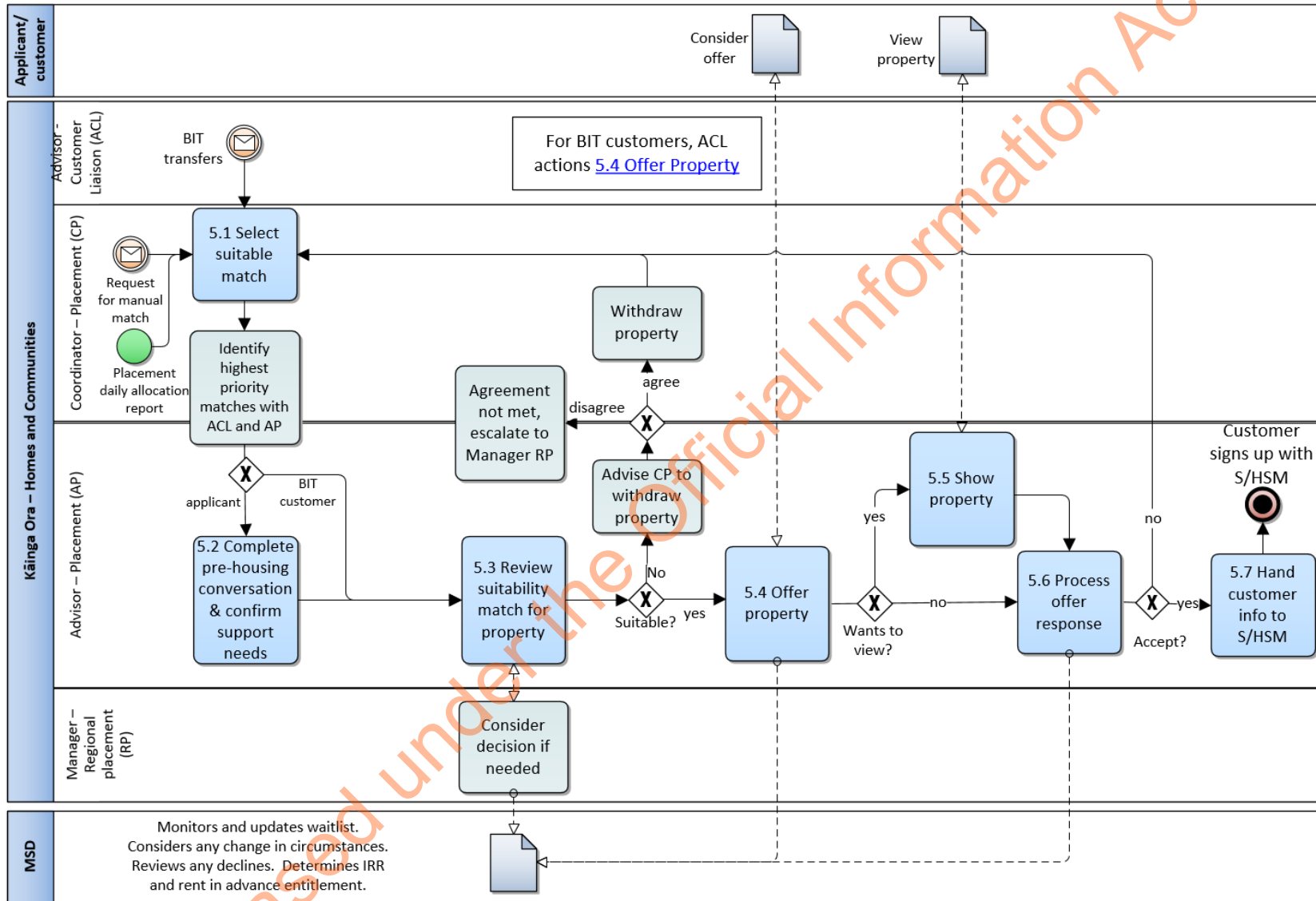
**MSD Social Housing Register** – A register held by MSD that prioritises applicants who have been assessed as eligible for social housing. Kāinga Ora pulls a shortlist from the Register when a Kāinga Ora property becomes available.

**Waitlist** - List of applicants on the MSD Social Housing Register. This list is refreshed and updated on a regular basis.

**Withdraw** - An offer status in Kotahi. Where a property match is not suitable for an applicant or customer, they may be withdrawn so that the match does not proceed. Applicants who are withdrawn will remain on the MSD waitlist, and customers will remain on the BIT list.

If any other words or phrases are used and you are unsure of the meaning, check the [glossary](#) on Atamai.

## 4. Process map



## 5. Procedures

### 5.1 Select suitable match

#### Role

- Coordinator Placement

#### When to use

Use this procedure to review available properties and select a match to recommend to the Placement Team.

#### Before you start

Be familiar with POL-354 Policy: Match to a Suitable Home and CT-GDL-006 Guideline.

#### Business Rules:

- Vacant properties must be matched in line with the agreed placement priorities, which is, high priority BIT customers are considered before Social Housing Register applicants. See Policy: Matching to Suitable Home.
- Before entering into a tenancy agreement with a person aged 18 or under, the agreement must be approved by the Tenancy Tribunal. Where a person aged 18 or under is or has been married or in a civil union, prior approval by the Tenancy Tribunal is not required.
- If an applicant is subject to probation conditions, their probation officer may need to determine if the match is suitable and formally sign off any offer before placement can proceed. See T-441 Disclosure of information by the Department of Corrections to Kāinga Ora.
- If an applicant or household member is a child sex offender subject to a community supervision order, Corrections must formally agree that the property is suitable before placement can proceed and any offer made. For more details, see Child sex offender – Recording and placement (CT-PRO-301).
- If the vacant property is modified it must be offered firstly to any applicant or customer who needs a property with the specified modifications. Placement priority still applies.

## Steps

Step	Action								
1	<p>Review properties available for matching as appropriate or as required, using the IDP <a href="#">Placement Daily Allocation</a> report. You can also view additional individual property details including photos in single property view.</p> <p><b>Business rule:</b> New builds and any properties that have undergone substantial work requiring building consent must not to be matched until you have received the Code Compliance Certificate.</p> <p>Check whether you received any requests to match the property from the Manager Regional Placement or Advisor Customer Liaison. For more details about manual matching, see Guidelines CT-GDL-006 (refer to section 4.6 'Manual matching')</p>								
2	<p>Check the BIT customer register for high priority customers based on placement priorities.</p> <p><a href="#">Pull a waitlist</a> from MSD and check that the Context Report appears with the word "success".</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• If the document does not appear, there is a technical error. Investigate with the service desk to resolve and repeat this step.</li> <li>• For more detail on placement priority, see POL-354 Match to a Suitable Home.</li> </ul>								
3	<p><a href="#">Generate a shortlist</a> of possible matches for the property.</p>								
4	<p>Check whether the property has specific characteristics (for example, the property is modified or the property is restricted to elderly occupants) and <a href="#">apply restrictions to the shortlist in Kotahi</a>, to identify suitable applicants that better meet those requirements if required.</p>								
5	<p>Review the shortlist, the BIT register and any other request for the property with the Advisor Placement and Advisor Customer Liaison to discuss who the highest priority matches are. Agree who to match against this property.</p> <p><b>Business rule:</b> The Manager Regional Placement must approve any matches that are not in line with placement priority.</p> <table border="1"> <thead> <tr> <th>If the match is ...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>a manual match request from Manager Regional Placement</td> <td> <ul style="list-style-type: none"> <li>• go to next step</li> </ul> </td> </tr> <tr> <td>for a Business Initiated Transfer (BIT)</td> <td> <ul style="list-style-type: none"> <li>• go to next step</li> </ul> </td> </tr> <tr> <td>for an applicant on the MSD waitlist</td> <td> <ul style="list-style-type: none"> <li>• go to step 7</li> </ul> </td> </tr> </tbody> </table>	If the match is ...	Then...	a manual match request from Manager Regional Placement	<ul style="list-style-type: none"> <li>• go to next step</li> </ul>	for a Business Initiated Transfer (BIT)	<ul style="list-style-type: none"> <li>• go to next step</li> </ul>	for an applicant on the MSD waitlist	<ul style="list-style-type: none"> <li>• go to step 7</li> </ul>
If the match is ...	Then...								
a manual match request from Manager Regional Placement	<ul style="list-style-type: none"> <li>• go to next step</li> </ul>								
for a Business Initiated Transfer (BIT)	<ul style="list-style-type: none"> <li>• go to next step</li> </ul>								
for an applicant on the MSD waitlist	<ul style="list-style-type: none"> <li>• go to step 7</li> </ul>								
6	<p>Carry out the following actions:</p> <ul style="list-style-type: none"> <li>• <a href="#">create Manual Offer</a> in Kotahi. (<b>Note:</b> the application has to be live in Kotahi.)</li> </ul>								

	<ul style="list-style-type: none"> <li>generate the following documents about the applicant or customer from Kotahi and pass on to the Advisor Placement: <ul style="list-style-type: none"> <li>context reports, including a snippet of the: <ul style="list-style-type: none"> <li>offer details screen</li> <li>pre-housing conversation outcome brief, where available</li> <li><a href="#">the application summary (T 365)</a></li> </ul> </li> </ul> </li> <li>go to <a href="#">5.3 Review match for property</a></li> </ul>										
7	<p>View the first applicant on the shortlist and consider their suitability for the property.</p> <table border="1"> <thead> <tr> <th data-bbox="308 595 871 658">If...</th> <th data-bbox="871 595 1449 658">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="308 658 871 976"> <p>the applicant is a suitable match</p> </td> <td data-bbox="871 658 1449 976"> <ul style="list-style-type: none"> <li><a href="#">create shortlist offer</a> in Kotahi</li> <li>go to step 8</li> </ul> <p><b>Note:</b> If the applicant or a household member is a child sex offender subject to a community supervision order email the Advisor Placement to confirm whether the property is a suitable match</p> </td> </tr> <tr> <td data-bbox="308 976 871 1413"> <p>the applicant is not a suitable match (according to the <i>acceptable reasons to bypass an applicant</i>).</p> <p><b>Note:</b> There must be enough current and sufficient information available to make an informed decision, otherwise the match cannot be bypassed.</p> <p><b>Note:</b> For more detail on the acceptable reasons to bypass an applicant, see CT-GDL-006 Guideline.</p> </td> <td data-bbox="871 976 1449 1413"> <ul style="list-style-type: none"> <li><a href="#">bypass match</a> in Kotahi and ensure to enter a detailed reason for the bypass.</li> <li>repeat this step with the next applicant on the shortlist</li> </ul> </td> </tr> <tr> <td data-bbox="308 1413 871 1809"> <p>there are no suitable matches, consider looking at matches that will underutilise or overcrowd the property to find a match</p> </td> <td data-bbox="871 1413 1449 1809"> <ul style="list-style-type: none"> <li><a href="#">generate a shortlist</a> with <a href="#">Restrictions</a> in Kotahi using question ref 805 and specify number of bedrooms to review applicants who require one bedroom less or one bedroom more than the property being matched</li> <li>email the Manager Regional Placement to keep them up-to-date</li> <li>go to step 4</li> </ul> </td> </tr> <tr> <td data-bbox="308 1809 871 1960"> <p>there are no suitable matches after additional search completed</p> </td> <td data-bbox="871 1809 1449 1960"> <ul style="list-style-type: none"> <li>match to a lower priority applicant or customer</li> <li>go to step 5</li> </ul> </td> </tr> </tbody> </table>	If...	Then...	<p>the applicant is a suitable match</p>	<ul style="list-style-type: none"> <li><a href="#">create shortlist offer</a> in Kotahi</li> <li>go to step 8</li> </ul> <p><b>Note:</b> If the applicant or a household member is a child sex offender subject to a community supervision order email the Advisor Placement to confirm whether the property is a suitable match</p>	<p>the applicant is not a suitable match (according to the <i>acceptable reasons to bypass an applicant</i>).</p> <p><b>Note:</b> There must be enough current and sufficient information available to make an informed decision, otherwise the match cannot be bypassed.</p> <p><b>Note:</b> For more detail on the acceptable reasons to bypass an applicant, see CT-GDL-006 Guideline.</p>	<ul style="list-style-type: none"> <li><a href="#">bypass match</a> in Kotahi and ensure to enter a detailed reason for the bypass.</li> <li>repeat this step with the next applicant on the shortlist</li> </ul>	<p>there are no suitable matches, consider looking at matches that will underutilise or overcrowd the property to find a match</p>	<ul style="list-style-type: none"> <li><a href="#">generate a shortlist</a> with <a href="#">Restrictions</a> in Kotahi using question ref 805 and specify number of bedrooms to review applicants who require one bedroom less or one bedroom more than the property being matched</li> <li>email the Manager Regional Placement to keep them up-to-date</li> <li>go to step 4</li> </ul>	<p>there are no suitable matches after additional search completed</p>	<ul style="list-style-type: none"> <li>match to a lower priority applicant or customer</li> <li>go to step 5</li> </ul>
If...	Then...										
<p>the applicant is a suitable match</p>	<ul style="list-style-type: none"> <li><a href="#">create shortlist offer</a> in Kotahi</li> <li>go to step 8</li> </ul> <p><b>Note:</b> If the applicant or a household member is a child sex offender subject to a community supervision order email the Advisor Placement to confirm whether the property is a suitable match</p>										
<p>the applicant is not a suitable match (according to the <i>acceptable reasons to bypass an applicant</i>).</p> <p><b>Note:</b> There must be enough current and sufficient information available to make an informed decision, otherwise the match cannot be bypassed.</p> <p><b>Note:</b> For more detail on the acceptable reasons to bypass an applicant, see CT-GDL-006 Guideline.</p>	<ul style="list-style-type: none"> <li><a href="#">bypass match</a> in Kotahi and ensure to enter a detailed reason for the bypass.</li> <li>repeat this step with the next applicant on the shortlist</li> </ul>										
<p>there are no suitable matches, consider looking at matches that will underutilise or overcrowd the property to find a match</p>	<ul style="list-style-type: none"> <li><a href="#">generate a shortlist</a> with <a href="#">Restrictions</a> in Kotahi using question ref 805 and specify number of bedrooms to review applicants who require one bedroom less or one bedroom more than the property being matched</li> <li>email the Manager Regional Placement to keep them up-to-date</li> <li>go to step 4</li> </ul>										
<p>there are no suitable matches after additional search completed</p>	<ul style="list-style-type: none"> <li>match to a lower priority applicant or customer</li> <li>go to step 5</li> </ul>										

8	<p><a href="#">Create offer stage - advise MSD</a> in Kotahi for applicants and check that the offer stage updates to 'MSDR- MSD response for match'. (This is a Kotahi stage and not a formal match to the property).</p> <p><b>Notes:</b> If the offer stage does not update to <b>MSDR</b> after a few minutes, there is a technical error. Investigate with the service desk to resolve and repeat this step.</p> <p>No offers can be made until this has updated. This is MSD's approval of the offer and financial information will appear on the screen with income related rent details and rent in advance approval.</p>								
9	<p>Take appropriate action as noted below:</p> <table border="1" data-bbox="308 611 1441 1258"> <thead> <tr> <th data-bbox="308 611 683 674">If ...</th> <th data-bbox="691 611 1441 674">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="308 685 683 902">a Pre-Housing Conversation is needed</td> <td data-bbox="691 685 1441 902"> <ul style="list-style-type: none"> <li>pass the applicant details on to the Advisor Placement so they can arrange a pre-housing conversation</li> <li>see <a href="#">5.2 Carry out Pre-Housing Conversation and confirm any support needs</a></li> </ul> </td> </tr> <tr> <td data-bbox="308 913 683 1081">it is less than 3 months since the last engagement (BIT interview or a Pre-Housing Conversation)</td> <td data-bbox="691 913 1441 1081"> <ul style="list-style-type: none"> <li>go to <a href="#">5.3 Review match suitability for property</a></li> </ul> </td> </tr> <tr> <td data-bbox="308 1093 683 1258">it has been 3 months since the last engagement (BIT interview or a Pre-Housing Conversation)</td> <td data-bbox="691 1093 1441 1258"> <ul style="list-style-type: none"> <li>we should make contact with the customer to see if circumstances are the same</li> <li>see <a href="#">5.2 Carry out Pre-Housing Conversation and confirm any support needs</a></li> </ul> </td> </tr> </tbody> </table>	If ...	Then...	a Pre-Housing Conversation is needed	<ul style="list-style-type: none"> <li>pass the applicant details on to the Advisor Placement so they can arrange a pre-housing conversation</li> <li>see <a href="#">5.2 Carry out Pre-Housing Conversation and confirm any support needs</a></li> </ul>	it is less than 3 months since the last engagement (BIT interview or a Pre-Housing Conversation)	<ul style="list-style-type: none"> <li>go to <a href="#">5.3 Review match suitability for property</a></li> </ul>	it has been 3 months since the last engagement (BIT interview or a Pre-Housing Conversation)	<ul style="list-style-type: none"> <li>we should make contact with the customer to see if circumstances are the same</li> <li>see <a href="#">5.2 Carry out Pre-Housing Conversation and confirm any support needs</a></li> </ul>
If ...	Then...								
a Pre-Housing Conversation is needed	<ul style="list-style-type: none"> <li>pass the applicant details on to the Advisor Placement so they can arrange a pre-housing conversation</li> <li>see <a href="#">5.2 Carry out Pre-Housing Conversation and confirm any support needs</a></li> </ul>								
it is less than 3 months since the last engagement (BIT interview or a Pre-Housing Conversation)	<ul style="list-style-type: none"> <li>go to <a href="#">5.3 Review match suitability for property</a></li> </ul>								
it has been 3 months since the last engagement (BIT interview or a Pre-Housing Conversation)	<ul style="list-style-type: none"> <li>we should make contact with the customer to see if circumstances are the same</li> <li>see <a href="#">5.2 Carry out Pre-Housing Conversation and confirm any support needs</a></li> </ul>								



## 5.2 Carry out Pre-housing conversation and confirm any support needs

- Advisor Placement

### When to use

Use this procedure to have a conversation with an applicant to help identify if the property is a match and identify any support needs. Contact must be made to schedule the Pre-housing conversation within 24 hours of the match being made.

**Note:** If it has been 3 months since the last engagement (BIT interview or a Pre-Housing Conversation) we should make contact with the customer to see if circumstances are the same.

### Business rule

- An applicant should not be notified of a property match until the property status is at CONFVOID and the property is vacant.
- When undertaking a Pre-housing conversation, do not indicate that the applicant is being considered for a property potentially becoming available.

### Before you begin

Check to see if the applicant has completed a pre-housing conversation previously – this may determine how in-depth the pre-housing conversation needs to be.

### Steps

Step	Action						
1	<p>Contact the applicant to arrange a time and location for a pre-housing conversation to discuss their needs. Explain the purpose of the conversation and encourage them to participate because it will help us to match them to the right home.</p> <p><b>Note:</b> The pre-housing conversation is optional, make sure applicant is aware of this. If the applicant declines the conversation, this will not affect their status on the shortlist or ability to be offered a home. We will use the information provided by MSD for an applicant and/or use any existing information in Kotahi. See Guidelines for completing Pre-Housing Conversation (CT-GDL-011)</p> <table border="1"> <thead> <tr> <th>If you...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>make contact</td> <td> <ul style="list-style-type: none"> <li>• go to next step</li> </ul> </td> </tr> <tr> <td>are unable to make contact (e.g., phone number is not valid)</td> <td> <ul style="list-style-type: none"> <li>• email the add-in template to the Interagency Team for updated contact details</li> <li>• wait 24 hours for response from Interagency Team</li> </ul> <p><b>Note:</b> if no new contact details are available, email a request to <b>Pend</b></p> </td> </tr> </tbody> </table>	If you...	Then...	make contact	<ul style="list-style-type: none"> <li>• go to next step</li> </ul>	are unable to make contact (e.g., phone number is not valid)	<ul style="list-style-type: none"> <li>• email the add-in template to the Interagency Team for updated contact details</li> <li>• wait 24 hours for response from Interagency Team</li> </ul> <p><b>Note:</b> if no new contact details are available, email a request to <b>Pend</b></p>
If you...	Then...						
make contact	<ul style="list-style-type: none"> <li>• go to next step</li> </ul>						
are unable to make contact (e.g., phone number is not valid)	<ul style="list-style-type: none"> <li>• email the add-in template to the Interagency Team for updated contact details</li> <li>• wait 24 hours for response from Interagency Team</li> </ul> <p><b>Note:</b> if no new contact details are available, email a request to <b>Pend</b></p>						

Step	Action						
	<p>application to Interagency Team via the Coordinator Placement and make a note in Kotahi</p> <ul style="list-style-type: none"> <li>repeat this step when updated contact details are received</li> </ul>						
	<p>are unable to make contact after two attempts (including text message and voice mail)</p> <ul style="list-style-type: none"> <li>go to <a href="#">5.3 Review match suitability for property</a></li> </ul>						
2	<p>Follow Guidelines for completing Pre-Housing Conversation (CT-GDL-011). If arranging a face to face Pre-Housing Conversation, be familiar with:</p> <ul style="list-style-type: none"> <li>'Personal safety out of the office' section of Staying Safe and Secure (SS-GSL-110)</li> <li><a href="#">Manage Customer Risk Rating</a> (if applicable)</li> </ul> <p>Make a note in Kotahi to record the time and location of the Pre-Housing Conversation and to add your details as the Advisor Placement for that applicant. Go to next step.</p>						
3	<p>Complete the Pre-Housing Conversation with the applicant. See Pre-Housing Conversation Summary (CT-FRM-005)</p> <p>From your conversation, determine if the applicant has any support needs.</p> <table border="1"> <thead> <tr> <th>If ...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>support need is identified</td> <td> <ul style="list-style-type: none"> <li>provide applicant with information around support services available and how they can connect to these services</li> <li>make sure the applicant's support needs are noted in the Pre-housing Conversation Summary</li> <li>go to next step</li> </ul> <p><b>Note:</b> We cannot make a referral for the applicant on their behalf as they are not yet our customer. However, we will refer them back to MSD to assist them with the support they need.</p> </td> </tr> <tr> <td>applicant has no support need</td> <td> <ul style="list-style-type: none"> <li>go to next step</li> </ul> </td> </tr> </tbody> </table>	If ...	Then...	support need is identified	<ul style="list-style-type: none"> <li>provide applicant with information around support services available and how they can connect to these services</li> <li>make sure the applicant's support needs are noted in the Pre-housing Conversation Summary</li> <li>go to next step</li> </ul> <p><b>Note:</b> We cannot make a referral for the applicant on their behalf as they are not yet our customer. However, we will refer them back to MSD to assist them with the support they need.</p>	applicant has no support need	<ul style="list-style-type: none"> <li>go to next step</li> </ul>
If ...	Then...						
support need is identified	<ul style="list-style-type: none"> <li>provide applicant with information around support services available and how they can connect to these services</li> <li>make sure the applicant's support needs are noted in the Pre-housing Conversation Summary</li> <li>go to next step</li> </ul> <p><b>Note:</b> We cannot make a referral for the applicant on their behalf as they are not yet our customer. However, we will refer them back to MSD to assist them with the support they need.</p>						
applicant has no support need	<ul style="list-style-type: none"> <li>go to next step</li> </ul>						
4	<p>Make a <a href="#">note in Kotahi recording the outcome of the conversation</a> and any support needs identified.</p>						

### What happens next?

The Advisor Placement reviews all available information and confirms whether the match is suitable. Go to [5.3 Review match suitability for property](#).

### 5.3 Review match suitability for property

#### Role

- Advisor Placement (reviews match for suitability)
- Coordinator Placement (actions decisions in Kotahi)

#### When to use

Use this procedure to review and confirm whether the property match is suitable. The property match must be reviewed within 24 hours.

#### Business rules

- A high priority BIT customer or applicant must be offered the available property, unless that property is unsuitable according to the *acceptable reasons to withdraw a property match*. Refer to CT-GDL-006 Guideline for detail on the acceptable withdraw reasons.
- A property is also considered unsuitable and cannot be offered to an applicant or customer if placement in that property would result in violation of probation conditions or violation of the requirements for placing child sex offenders.

#### Steps

Step	Action						
1	<p>Consider the needs of the applicant or customer and whether the property match is suitable.</p> <table border="1"> <thead> <tr> <th>If ...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>the match is suitable</td> <td> <ul style="list-style-type: none"> <li>• advise Coordinator Placement to <a href="#">create offer stage - accept match</a> in Kotahi</li> <li>• go to <a href="#">5.5 Offer property</a></li> </ul> </td> </tr> <tr> <td>the match is not suitable</td> <td> <ul style="list-style-type: none"> <li>• go to the next step</li> </ul> </td> </tr> </tbody> </table>	If ...	Then...	the match is suitable	<ul style="list-style-type: none"> <li>• advise Coordinator Placement to <a href="#">create offer stage - accept match</a> in Kotahi</li> <li>• go to <a href="#">5.5 Offer property</a></li> </ul>	the match is not suitable	<ul style="list-style-type: none"> <li>• go to the next step</li> </ul>
If ...	Then...						
the match is suitable	<ul style="list-style-type: none"> <li>• advise Coordinator Placement to <a href="#">create offer stage - accept match</a> in Kotahi</li> <li>• go to <a href="#">5.5 Offer property</a></li> </ul>						
the match is not suitable	<ul style="list-style-type: none"> <li>• go to the next step</li> </ul>						
2	<p>Review the reason why you think the property is not suitable for the applicant / customer.</p> <p>Always refer back to the Pre-housing Conversation Summary (CT-FRM-005), Business initiated transfer interview sheet (T474), or latest interaction with the applicant/customer to see how they explained what suitable would look like for them.</p> <table border="1"> <thead> <tr> <th>If ...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>the reason is one of the <i>acceptable reasons to withdraw a match</i>; <b>and</b> it is clear from conversations with the</td> <td> <ul style="list-style-type: none"> <li>• notify the Coordinator Placement that the match is to be withdrawn as it is unsuitable.</li> </ul> </td> </tr> </tbody> </table>	If ...	Then...	the reason is one of the <i>acceptable reasons to withdraw a match</i> ; <b>and</b> it is clear from conversations with the	<ul style="list-style-type: none"> <li>• notify the Coordinator Placement that the match is to be withdrawn as it is unsuitable.</li> </ul>		
If ...	Then...						
the reason is one of the <i>acceptable reasons to withdraw a match</i> ; <b>and</b> it is clear from conversations with the	<ul style="list-style-type: none"> <li>• notify the Coordinator Placement that the match is to be withdrawn as it is unsuitable.</li> </ul>						

	<p>applicant/customer that the property would not be suitable</p>	<ul style="list-style-type: none"> <li>Coordinator Placement will then <a href="#">create offer stage – reject match</a> and make detailed notes in Kotahi</li> <li>go to <a href="#">5.1 Select suitable match</a></li> </ul> <p><b>Note:</b> if the Coordinator Placement does not agree the match is unsuitable, go to step 3.</p>						
	<p>the reason is one of the <i>acceptable reasons to withdraw a match</i>; <b>but</b> conversations with the applicant/customer indicate that the applicant/customer might still want the property</p>	<ul style="list-style-type: none"> <li>do not withdraw the match</li> <li>notify the Coordinator Placement who will then <a href="#">create offer stage - accept match</a> in Kotahi</li> <li>go to <a href="#">5.5 Offer property</a></li> </ul> <p><b>Note:</b> we do not withdraw in this circumstance because we want to offer the property and give the applicant/customer a chance to view the property before considering a withdraw or decline.</p>						
	<p>the reason is <b>not</b> one of the acceptable reasons to withdraw a match</p>	<ul style="list-style-type: none"> <li>you cannot withdraw the match. Proceed with the match so that the applicant/customer can view the property and accept or decline.</li> <li>notify the Coordinator Placement who will then <a href="#">create offer stage - accept match</a> in Kotahi</li> <li>go to <a href="#">5.5 Offer property</a></li> </ul>						
<p>3</p>	<p>Discuss the reasons why you think the match is unsuitable with the Coordinator Placement. Take appropriate action as noted below.</p> <p><b>Note:</b> This step is only necessary if the Coordinator Placement does not agree with the Advisor Placement’s review in step 2.</p> <table border="1" data-bbox="323 1512 1385 1915"> <thead> <tr> <th data-bbox="323 1512 762 1574">If you both...</th> <th data-bbox="762 1512 1385 1574">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="323 1574 762 1765"> <p>agree that the match is not suitable</p> </td> <td data-bbox="762 1574 1385 1765"> <ul style="list-style-type: none"> <li>Coordinator Placement will <a href="#">create offer stage – reject match</a> and make detailed notes in Kotahi</li> <li>go to 5.1 Select suitable match</li> </ul> </td> </tr> <tr> <td data-bbox="323 1765 762 1915"> <p>agree that the match is suitable</p> </td> <td data-bbox="762 1765 1385 1915"> <ul style="list-style-type: none"> <li>Coordinator Placement will <a href="#">create offer stage - accept match</a> in Kotahi</li> <li>go to <a href="#">5.4 Offer property</a></li> </ul> </td> </tr> </tbody> </table>		If you both...	Then...	<p>agree that the match is not suitable</p>	<ul style="list-style-type: none"> <li>Coordinator Placement will <a href="#">create offer stage – reject match</a> and make detailed notes in Kotahi</li> <li>go to 5.1 Select suitable match</li> </ul>	<p>agree that the match is suitable</p>	<ul style="list-style-type: none"> <li>Coordinator Placement will <a href="#">create offer stage - accept match</a> in Kotahi</li> <li>go to <a href="#">5.4 Offer property</a></li> </ul>
If you both...	Then...							
<p>agree that the match is not suitable</p>	<ul style="list-style-type: none"> <li>Coordinator Placement will <a href="#">create offer stage – reject match</a> and make detailed notes in Kotahi</li> <li>go to 5.1 Select suitable match</li> </ul>							
<p>agree that the match is suitable</p>	<ul style="list-style-type: none"> <li>Coordinator Placement will <a href="#">create offer stage - accept match</a> in Kotahi</li> <li>go to <a href="#">5.4 Offer property</a></li> </ul>							

	cannot agree if the match is un/suitable	<ul style="list-style-type: none"> <li>• contact the Manager Regional Placement and request to discuss the property match</li> <li>• go to next step</li> </ul>						
4	<p>Review the decision from the Manager Regional Placement.</p> <p><b>Note:</b> the Manager Regional Placement may discuss the matter with the Manager Housing and Wellbeing where necessary.</p> <table border="1"> <thead> <tr> <th>If they advise the match is...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>not suitable</td> <td> <ul style="list-style-type: none"> <li>• advise Coordinator Placement who will then <a href="#">create offer stage – reject match</a> and make detailed notes in Kotahi</li> <li>• go to <a href="#">5.1 Select suitable match</a></li> </ul> </td> </tr> <tr> <td>suitable</td> <td> <ul style="list-style-type: none"> <li>• advise Coordinator Placement who will then <a href="#">create offer stage - accept match</a> in Kotahi</li> <li>• go to <a href="#">5.4 Offer property</a></li> </ul> </td> </tr> </tbody> </table>		If they advise the match is...	Then...	not suitable	<ul style="list-style-type: none"> <li>• advise Coordinator Placement who will then <a href="#">create offer stage – reject match</a> and make detailed notes in Kotahi</li> <li>• go to <a href="#">5.1 Select suitable match</a></li> </ul>	suitable	<ul style="list-style-type: none"> <li>• advise Coordinator Placement who will then <a href="#">create offer stage - accept match</a> in Kotahi</li> <li>• go to <a href="#">5.4 Offer property</a></li> </ul>
If they advise the match is...	Then...							
not suitable	<ul style="list-style-type: none"> <li>• advise Coordinator Placement who will then <a href="#">create offer stage – reject match</a> and make detailed notes in Kotahi</li> <li>• go to <a href="#">5.1 Select suitable match</a></li> </ul>							
suitable	<ul style="list-style-type: none"> <li>• advise Coordinator Placement who will then <a href="#">create offer stage - accept match</a> in Kotahi</li> <li>• go to <a href="#">5.4 Offer property</a></li> </ul>							

**Note:** If the match is not suitable at all and you think the applicant/customer would be better suited to supported living services, discuss this with the Manager Regional Placement.

#### What happens next?

If the match is found to be suitable, the applicant/customer is contacted to make an offer. Go to [5.4 Offer Property](#).

## 5.4 Offer property

### Role

- Advisor Placement (completes procedure for applicants)
- Advisor Customer Liaison (completes procedure for customers)

### When to use

Use this procedure to formally offer the applicant/customer a property and decide on viewing options.

### Steps

Step	Action								
1	<p>Carry out the following:</p> <ul style="list-style-type: none"> <li>• advise Coordinator Placement to <a href="#">create offer stage - full offer made</a> in Kotahi</li> <li>• check in Kotahi to see if property is ready to view</li> <li>• discuss with Void Specialist/Maintenance Supervisor to find out suitable times to view property</li> </ul> <p><b>Note:</b> If the property is not yet ready to view, we can offer the applicant/customer the option to view photos or to drive past the address.</p>								
2	<p>Contact the applicant/customer by their preferred method.</p> <table border="1"> <thead> <tr> <th>If you...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>make contact</td> <td> <ul style="list-style-type: none"> <li>• go to next step</li> </ul> </td> </tr> <tr> <td>are unable to make contact (e.g., phone number is not valid)</td> <td> <ul style="list-style-type: none"> <li>• email the add-in template to the Interagency Team for updated contact details</li> <li>• wait 24 hours for response from Interagency Team</li> </ul> <p><b>Note:</b> if no new contact details are available, email a request to <b>Pend</b> application to Interagency Team via Coordinator Placement and make a note in Kotahi</p> <ul style="list-style-type: none"> <li>• repeat this step when updated contact details are received</li> </ul> </td> </tr> <tr> <td>are unable to make contact after three reasonable attempts (for example, call, text message and voice mail)</td> <td> <ul style="list-style-type: none"> <li>• advise Coordinator Placement who will then <a href="#">update offer stage - withdraw offer</a> and make notes in Kotahi</li> <li>• go to <a href="#">5.1 Select suitable match</a></li> </ul> </td> </tr> </tbody> </table>	If you...	Then...	make contact	<ul style="list-style-type: none"> <li>• go to next step</li> </ul>	are unable to make contact (e.g., phone number is not valid)	<ul style="list-style-type: none"> <li>• email the add-in template to the Interagency Team for updated contact details</li> <li>• wait 24 hours for response from Interagency Team</li> </ul> <p><b>Note:</b> if no new contact details are available, email a request to <b>Pend</b> application to Interagency Team via Coordinator Placement and make a note in Kotahi</p> <ul style="list-style-type: none"> <li>• repeat this step when updated contact details are received</li> </ul>	are unable to make contact after three reasonable attempts (for example, call, text message and voice mail)	<ul style="list-style-type: none"> <li>• advise Coordinator Placement who will then <a href="#">update offer stage - withdraw offer</a> and make notes in Kotahi</li> <li>• go to <a href="#">5.1 Select suitable match</a></li> </ul>
If you...	Then...								
make contact	<ul style="list-style-type: none"> <li>• go to next step</li> </ul>								
are unable to make contact (e.g., phone number is not valid)	<ul style="list-style-type: none"> <li>• email the add-in template to the Interagency Team for updated contact details</li> <li>• wait 24 hours for response from Interagency Team</li> </ul> <p><b>Note:</b> if no new contact details are available, email a request to <b>Pend</b> application to Interagency Team via Coordinator Placement and make a note in Kotahi</p> <ul style="list-style-type: none"> <li>• repeat this step when updated contact details are received</li> </ul>								
are unable to make contact after three reasonable attempts (for example, call, text message and voice mail)	<ul style="list-style-type: none"> <li>• advise Coordinator Placement who will then <a href="#">update offer stage - withdraw offer</a> and make notes in Kotahi</li> <li>• go to <a href="#">5.1 Select suitable match</a></li> </ul>								
3	Ask the applicant/customer if they still require housing.								

Step	Action													
	<b>If...</b>	<b>Then...</b>												
	yes	<ul style="list-style-type: none"> <li>go to next step</li> </ul>												
	no	<ul style="list-style-type: none"> <li>advise Coordinator Placement who will then <a href="#">update offer stage-withdraw offer</a> and make notes in Kotahi</li> <li>go to <a href="#">5.1 Select suitable match</a></li> </ul>												
4	Offer the property to the applicant/customer providing key information about the property including: <ul style="list-style-type: none"> <li>any special tenancy conditions i.e., body corporate rules</li> <li>when the property is expected to be ready and property details</li> <li>the rent amount</li> <li>the different viewing options</li> <li>if the offer is subject to approval from other parties e.g., probation or Corrections</li> <li>general details about the surrounding area and community</li> </ul>													
5	Ask the applicant/customer which viewing option they prefer. <table border="1" data-bbox="319 1070 1401 1986"> <thead> <tr> <th>If the applicant/customer ...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>chooses to accept the property now</td> <td> <ul style="list-style-type: none"> <li>go to 5.6 <a href="#">Process offer response</a></li> </ul> </td> </tr> <tr> <td>chooses to decline the property</td> <td> <ul style="list-style-type: none"> <li>go to 5.6 <a href="#">Process offer response</a></li> </ul> </td> </tr> <tr> <td>           chooses to drive past the property  <b>Note:</b> ask the applicant/customer not to enter the property         </td> <td> <ul style="list-style-type: none"> <li>provide the address and ask them to contact us to confirm their decision by a set date and time</li> <li>go to 5.6 <a href="#">Process offer response</a></li> </ul> </td> </tr> <tr> <td>           would like to view photos  <b>Note:</b> google maps is useful to view location remotely and the pre-let inspection provides photos         </td> <td> <ul style="list-style-type: none"> <li>email the photos, or arrange a suitable time to visit the office to view</li> <li>ask them to contact us to confirm their decision by a set date and time</li> <li>go to 5.6 <a href="#">Process offer response</a></li> </ul> </td> </tr> <tr> <td>           wants to view inside  <b>Note:</b> To prepare for a meeting, see also 'Personal safety out of the office' section of Staying Safe and Secure (SS-GSL-110) and Manage Customer Risk Rating         </td> <td> <ul style="list-style-type: none"> <li>discuss with the Void Specialist/ Maintenance Supervisor and arrange a suitable time to meet at the property</li> <li>confirm meeting time and details with applicant and make notes in Kotahi</li> </ul> </td> </tr> </tbody> </table>		If the applicant/customer ...	Then...	chooses to accept the property now	<ul style="list-style-type: none"> <li>go to 5.6 <a href="#">Process offer response</a></li> </ul>	chooses to decline the property	<ul style="list-style-type: none"> <li>go to 5.6 <a href="#">Process offer response</a></li> </ul>	chooses to drive past the property <b>Note:</b> ask the applicant/customer not to enter the property	<ul style="list-style-type: none"> <li>provide the address and ask them to contact us to confirm their decision by a set date and time</li> <li>go to 5.6 <a href="#">Process offer response</a></li> </ul>	would like to view photos <b>Note:</b> google maps is useful to view location remotely and the pre-let inspection provides photos	<ul style="list-style-type: none"> <li>email the photos, or arrange a suitable time to visit the office to view</li> <li>ask them to contact us to confirm their decision by a set date and time</li> <li>go to 5.6 <a href="#">Process offer response</a></li> </ul>	wants to view inside <b>Note:</b> To prepare for a meeting, see also 'Personal safety out of the office' section of Staying Safe and Secure (SS-GSL-110) and Manage Customer Risk Rating	<ul style="list-style-type: none"> <li>discuss with the Void Specialist/ Maintenance Supervisor and arrange a suitable time to meet at the property</li> <li>confirm meeting time and details with applicant and make notes in Kotahi</li> </ul>
If the applicant/customer ...	Then...													
chooses to accept the property now	<ul style="list-style-type: none"> <li>go to 5.6 <a href="#">Process offer response</a></li> </ul>													
chooses to decline the property	<ul style="list-style-type: none"> <li>go to 5.6 <a href="#">Process offer response</a></li> </ul>													
chooses to drive past the property <b>Note:</b> ask the applicant/customer not to enter the property	<ul style="list-style-type: none"> <li>provide the address and ask them to contact us to confirm their decision by a set date and time</li> <li>go to 5.6 <a href="#">Process offer response</a></li> </ul>													
would like to view photos <b>Note:</b> google maps is useful to view location remotely and the pre-let inspection provides photos	<ul style="list-style-type: none"> <li>email the photos, or arrange a suitable time to visit the office to view</li> <li>ask them to contact us to confirm their decision by a set date and time</li> <li>go to 5.6 <a href="#">Process offer response</a></li> </ul>													
wants to view inside <b>Note:</b> To prepare for a meeting, see also 'Personal safety out of the office' section of Staying Safe and Secure (SS-GSL-110) and Manage Customer Risk Rating	<ul style="list-style-type: none"> <li>discuss with the Void Specialist/ Maintenance Supervisor and arrange a suitable time to meet at the property</li> <li>confirm meeting time and details with applicant and make notes in Kotahi</li> </ul>													

Step	Action
	<ul style="list-style-type: none"> <li>if property is not yet ready to view, advise Coordinator Placement who will then <a href="#">create offer stage-FACT full offer accepted</a> and make notes in Kotahi</li> <li>go to <a href="#">5.5 Show property</a></li> </ul>

### What happens next?

If applicant/customer has chosen to view photos or to drive past, ask them to contact us to confirm their decision within a reasonable timeframe. Go to [5.6 Process offer response](#).

If applicant/customer declines the property, go to [5.6 Process offer response](#).

## 5.5 Show property

### Role

- Advisor Placement
- Advisor Customer Liaison
- Void Specialist

### When to use

Use this procedure if the applicant/customer wants to view the inside of an available property to help them decide if they want to accept the offer.

### Before you start

Risk assessments and reviews must be undertaken to identify applicants/customers who may present as potentially hazardous, to protect Kāinga Ora staff, contractors, customers and the community. Safety procedures and contact rules must be followed to minimise the potential for harm. This includes preparation of safe work plans and situational awareness. A site induction is to be completed before entering the property.

Make sure the applicant/customer is aware of any health and safety requirements for viewing the property (bring additional footwear/clothing as required).

### Steps

Step	Action				
1	Meet the applicant/customer at the property to view.				
	<table border="1"> <thead> <tr> <th>If the applicant/customer...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>attends</td> <td> <ul style="list-style-type: none"> <li>show applicant/customer through the house</li> </ul> </td> </tr> </tbody> </table>	If the applicant/customer...	Then...	attends	<ul style="list-style-type: none"> <li>show applicant/customer through the house</li> </ul>
If the applicant/customer...	Then...				
attends	<ul style="list-style-type: none"> <li>show applicant/customer through the house</li> </ul>				



		<ul style="list-style-type: none"> <li>go to next step</li> </ul>						
	does not attend	<ul style="list-style-type: none"> <li>contact the applicant/customer to reschedule</li> <li>repeat this step</li> </ul>						
	does not attend and unable to contact after two attempts	<ul style="list-style-type: none"> <li>advise Coordinator Placement who will then <a href="#">update offer stage - decline offer</a> in Kotahi</li> <li>go to <a href="#">5.1 Select possible matches</a></li> </ul>						
2	<p>At the viewing:</p> <ul style="list-style-type: none"> <li>talk about the property features, yard layout, and neighbourhood</li> <li>explain any work to be done to the property and the expected finish date</li> <li>answer any questions the applicant might have</li> <li>if it is identified during the viewing that the property is clearly not going to meet the applicant or customer's key needs (eg, accessibility requirements) go to the next step.</li> <li>ask the applicant/customer if they are able to make a decision.</li> </ul> <table border="1"> <thead> <tr> <th>If...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>yes</td> <td> <ul style="list-style-type: none"> <li>advise the applicant/customer of the next steps</li> <li>go to <a href="#">5.6 Process offer response</a></li> </ul> </td> </tr> <tr> <td>no</td> <td> <ul style="list-style-type: none"> <li>ask applicant/customer to contact you or the Customer Service Centre with their decision within 48 hours</li> </ul> </td> </tr> </tbody> </table>	If...	Then...	yes	<ul style="list-style-type: none"> <li>advise the applicant/customer of the next steps</li> <li>go to <a href="#">5.6 Process offer response</a></li> </ul>	no	<ul style="list-style-type: none"> <li>ask applicant/customer to contact you or the Customer Service Centre with their decision within 48 hours</li> </ul>	
If...	Then...							
yes	<ul style="list-style-type: none"> <li>advise the applicant/customer of the next steps</li> <li>go to <a href="#">5.6 Process offer response</a></li> </ul>							
no	<ul style="list-style-type: none"> <li>ask applicant/customer to contact you or the Customer Service Centre with their decision within 48 hours</li> </ul>							
3	<p>If at the viewing, you realise the property is not going to meet the applicant/customer's minimum housing needs, discuss with the applicant/customer about why the property is unsuitable and does not meet a key need.</p> <p><b>Note:</b></p> <p>This scenario can happen for example if Kotahi indicates that a property has modifications, but it becomes clear during the property viewing that the type of modifications are not sufficient for the applicant/customer's needs.</p> <p>This type of scenario is not considered a decline – refer to the <i>acceptable reasons to withdraw a property match</i> in CT-GDL-006 Guideline.</p> <table border="1"> <thead> <tr> <th>If...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>the reason is one of the <i>acceptable reasons to withdraw a match</i>; <b>and</b> the applicant/customer agrees that the property is not suitable</td> <td> <ul style="list-style-type: none"> <li>notify the Coordinator Placement that the match is to be withdrawn as it is unsuitable.</li> <li>Coordinator Placement will then <a href="#">update offer stage - withdraw offer</a> in Kotahi</li> </ul> </td> </tr> <tr> <td>the reason is <b>not</b> one of the acceptable reasons to withdrawn a match; <b>but</b> the</td> <td> <ul style="list-style-type: none"> <li>you cannot withdraw the property offer. This is considered a decline</li> </ul> </td> </tr> </tbody> </table>	If...	Then...	the reason is one of the <i>acceptable reasons to withdraw a match</i> ; <b>and</b> the applicant/customer agrees that the property is not suitable	<ul style="list-style-type: none"> <li>notify the Coordinator Placement that the match is to be withdrawn as it is unsuitable.</li> <li>Coordinator Placement will then <a href="#">update offer stage - withdraw offer</a> in Kotahi</li> </ul>	the reason is <b>not</b> one of the acceptable reasons to withdrawn a match; <b>but</b> the	<ul style="list-style-type: none"> <li>you cannot withdraw the property offer. This is considered a decline</li> </ul>	
If...	Then...							
the reason is one of the <i>acceptable reasons to withdraw a match</i> ; <b>and</b> the applicant/customer agrees that the property is not suitable	<ul style="list-style-type: none"> <li>notify the Coordinator Placement that the match is to be withdrawn as it is unsuitable.</li> <li>Coordinator Placement will then <a href="#">update offer stage - withdraw offer</a> in Kotahi</li> </ul>							
the reason is <b>not</b> one of the acceptable reasons to withdrawn a match; <b>but</b> the	<ul style="list-style-type: none"> <li>you cannot withdraw the property offer. This is considered a decline</li> </ul>							

applicant/customer does not think the property is suitable	<ul style="list-style-type: none"> <li>go to <a href="#">5.6 Process offer response</a></li> </ul>
the reason is one of the <i>acceptable reasons to withdraw a match</i> ; <b>but</b> the applicant/customer thinks the property is suitable and they would be able to live in the home safely	<ul style="list-style-type: none"> <li>go to <a href="#">5.6 Process offer response</a></li> </ul>

### What happens next?

- Applicant/customer will contact us with their decision. If they contact the Customer Service Centre, a Customer Support Advisor contacts the Advisor Placement to let them know their decision. Go to [5.6 Process offer response](#).

## 5.6 Process offer response

### Role

- Advisor Placement
- Advisor Customer Liaison

### When to use

Use this procedure to follow up and action a decision from the applicant/customer to accept or decline an offer.

### Steps

Step	Action						
1	Check whether you have received any updates or response to offers made. Monitor and review timeframes using your calendar.						
	<table border="1"> <thead> <tr> <th>If you have...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>received a decision</td> <td> <ul style="list-style-type: none"> <li>go to step 3</li> </ul> </td> </tr> <tr> <td>not received a decision within 48 hours</td> <td> <ul style="list-style-type: none"> <li>go to next step</li> </ul> </td> </tr> </tbody> </table>	If you have...	Then...	received a decision	<ul style="list-style-type: none"> <li>go to step 3</li> </ul>	not received a decision within 48 hours	<ul style="list-style-type: none"> <li>go to next step</li> </ul>
	If you have...	Then...					
received a decision	<ul style="list-style-type: none"> <li>go to step 3</li> </ul>						
not received a decision within 48 hours	<ul style="list-style-type: none"> <li>go to next step</li> </ul>						
not received a decision within 48 hours	<ul style="list-style-type: none"> <li>go to next step</li> </ul>						
2	Try to contact the applicant/customer to get their decision.						
	<table border="1"> <thead> <tr> <th>If you...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>make contact</td> <td> <ul style="list-style-type: none"> <li>ask the applicant/customer for their decision</li> </ul> </td> </tr> </tbody> </table>	If you...	Then...	make contact	<ul style="list-style-type: none"> <li>ask the applicant/customer for their decision</li> </ul>		
If you...	Then...						
make contact	<ul style="list-style-type: none"> <li>ask the applicant/customer for their decision</li> </ul>						

Step	Action				
	<ul style="list-style-type: none"> <li>if applicant asks for more time, give them 24 hours to decide</li> <li>repeat this step</li> </ul>				
	<p>are unable to make contact (e.g., phone number is not valid)</p> <ul style="list-style-type: none"> <li>email the add-in template to the Interagency Team for updated contact details</li> <li>wait 24 hours for response from Interagency Team</li> </ul> <p><b>Note:</b> if no new contact details are available, email a request to <b>Pend</b> application to Interagency Team via Coordinator Placement and make a note in Kotahi</p> <ul style="list-style-type: none"> <li>repeat this step when updated contact details are received</li> </ul>				
	<p>are unable to contact after four attempts (including text message and voice mail)</p> <ul style="list-style-type: none"> <li>advise Coordinator Placement who will then <a href="#">update offer stage - decline offer</a> in Kotahi</li> <li>go to step 4</li> </ul>				
3	<p>Consider the decision from the applicant/customer.</p> <table border="1"> <thead> <tr> <th>If they...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>accept the offer</td> <td> <ul style="list-style-type: none"> <li>contact the applicant/customer to discuss any support required for the move and answer any questions about the tenancy (See also CT-GDL-006 guideline)</li> <li>review Kotahi case notes for any support needs discussed either at Pre-housing Conversation or other interactions. Follow up with the applicant or customer to confirm if they want us: <ul style="list-style-type: none"> <li>to make a referral for support services on their behalf; or</li> <li>provide information to them so they can make the referral themselves</li> </ul> </li> <li>let them know that their Housing Support Manager will be in touch soon to arrange a time for sign up. Also check with customer if they would like to receive the <a href="#">Guide to understanding your Tenancy Agreement</a> and send them a link if needed. See also <a href="#">CT-GDL-006 guideline</a>. (<b>Note:</b> Once the Housing Support Manager has set a time and date for sign-</li> </ul> </td> </tr> </tbody> </table>	If they...	Then...	accept the offer	<ul style="list-style-type: none"> <li>contact the applicant/customer to discuss any support required for the move and answer any questions about the tenancy (See also CT-GDL-006 guideline)</li> <li>review Kotahi case notes for any support needs discussed either at Pre-housing Conversation or other interactions. Follow up with the applicant or customer to confirm if they want us: <ul style="list-style-type: none"> <li>to make a referral for support services on their behalf; or</li> <li>provide information to them so they can make the referral themselves</li> </ul> </li> <li>let them know that their Housing Support Manager will be in touch soon to arrange a time for sign up. Also check with customer if they would like to receive the <a href="#">Guide to understanding your Tenancy Agreement</a> and send them a link if needed. See also <a href="#">CT-GDL-006 guideline</a>. (<b>Note:</b> Once the Housing Support Manager has set a time and date for sign-</li> </ul>
If they...	Then...				
accept the offer	<ul style="list-style-type: none"> <li>contact the applicant/customer to discuss any support required for the move and answer any questions about the tenancy (See also CT-GDL-006 guideline)</li> <li>review Kotahi case notes for any support needs discussed either at Pre-housing Conversation or other interactions. Follow up with the applicant or customer to confirm if they want us: <ul style="list-style-type: none"> <li>to make a referral for support services on their behalf; or</li> <li>provide information to them so they can make the referral themselves</li> </ul> </li> <li>let them know that their Housing Support Manager will be in touch soon to arrange a time for sign up. Also check with customer if they would like to receive the <a href="#">Guide to understanding your Tenancy Agreement</a> and send them a link if needed. See also <a href="#">CT-GDL-006 guideline</a>. (<b>Note:</b> Once the Housing Support Manager has set a time and date for sign-</li> </ul>				

Step	Action
	<p>up, they will contact the Coordinator Placement and request for the Tenancy Agreement to be generated in Kotahi – this should be generated no more than 24 hours before sign-up.)</p> <ul style="list-style-type: none"> <li>advise Coordinator Placement who will then update or <a href="#">create offer stage – full offer accepted</a> and make notes in Kotahigo to 5.7</li> </ul>
	<p>decline the offer</p> <ul style="list-style-type: none"> <li>for applicants only, advise them that MSD will consider the reasons for decline and will notify them directly to discuss further.</li> <li>for applicants only, discuss whether they would be happy to be bypassed for similar properties that come up in the future and record the applicant's preferences as a note in Kotahi.</li> <li>advise Coordinator Placement who will then <a href="#">update offer stage - decline offer</a> in Kotahi</li> <li>go to step 4</li> </ul>
4	Contact the next applicant/customer on the shortlist or go to <a href="#">5.1 Select suitable match</a> .

**What happens next?**

- If the applicant has declined the property, MSD will review the application and advise the applicant of any decision. Restart the matching process as needed, go to [5.1 Select suitable match](#)
- If the applicant/customer has accepted the property, the Advisor Placement arranges to hand over information to a Senior/Housing Support Manager. Go to [5.7 Hand over customer information to Senior/Housing Support Manager](#).

## 5.7 Hand over applicant/customer information to Senior/Housing Support Manager

### Role

- Advisor Placement
- Advisor Customer Liaison

### When to use

Use this procedure to hand over information about an applicant or customer to a Senior/Housing Support Manager.

### Steps

Step	Action						
1	<p>Collate all information captured throughout the matching process and make sure it is ready to be handed over to the Senior/Housing Support Manager.</p> <table border="1"> <thead> <tr> <th>If ...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>a Pre-Housing Conversation was completed</td> <td> <ul style="list-style-type: none"> <li>• Check the Pre Housing Conversation Summary (CT-FRM-005) and make sure all details are recorded correctly for hand over to the Senior/Housing Support Manager</li> <li>• go to next step</li> </ul> </td> </tr> <tr> <td>no Pre-Housing Conversation was completed</td> <td> <ul style="list-style-type: none"> <li>• go to next step</li> </ul> </td> </tr> </tbody> </table>	If ...	Then...	a Pre-Housing Conversation was completed	<ul style="list-style-type: none"> <li>• Check the Pre Housing Conversation Summary (CT-FRM-005) and make sure all details are recorded correctly for hand over to the Senior/Housing Support Manager</li> <li>• go to next step</li> </ul>	no Pre-Housing Conversation was completed	<ul style="list-style-type: none"> <li>• go to next step</li> </ul>
If ...	Then...						
a Pre-Housing Conversation was completed	<ul style="list-style-type: none"> <li>• Check the Pre Housing Conversation Summary (CT-FRM-005) and make sure all details are recorded correctly for hand over to the Senior/Housing Support Manager</li> <li>• go to next step</li> </ul>						
no Pre-Housing Conversation was completed	<ul style="list-style-type: none"> <li>• go to next step</li> </ul>						
2	<p>Contact allocated Senior/Housing Support Manager within 24 hours of the applicant/customer accepting the property to complete hand over process. Hand over information includes the following, if available:</p> <ul style="list-style-type: none"> <li>• support the applicant or customer is already engaged with</li> <li>• support the applicant or customer needs in the home and other support needs</li> <li>• referrals sent to service providers</li> <li>• completed Pre-Housing Conversation Summary (CT-FRM-005)</li> <li>• T-365 MSD applicant summary form if needed</li> <li>• T-474 Kāinga Ora Business Initiated Transfer Interview Sheet.</li> </ul>						
3	<p>Contact the applicant or customer to introduce their Senior/Housing Support Manager and confirm what happens next. This process ends.</p>						

## 6. Supporting information

### Processes

- Sign up customer (CT-PRO-002)
- Child sex offender – Recording and placement (CT-PRO-301)
- Manage customer risk register
- Refer tenant/whānau to a support service (CT-PRO-204)

### Guidelines

- Guideline for matching applicants and customers to a suitable home (CT-GDL-006)
- Guideline for completing Pre-Housing Conversation (CT-GDL-011)
- Tenancy Management guidelines
- Guideline: Make a referral to a support service (CT-GDL-012)
- Guideline for customer wellbeing conversations (CT-GDL-005)

### Forms

- Pre-housing Conversation Summary (CT-FRM-005)
- Safe Work Plan and Corporate Care Request Form
- Transfer Interview sheet (T-474)

### Other

- Staying Safe and Secure (SS-GSL-110)
- Health, safety and security portal
- Kotahi Glossary

## 7. System steps

### 7.1 Kotahi steps

If you clicked a hyperlink to get here, press **Alt + Left Arrow** to return to your place in the procedure.

Action	Kotahi path
<b>Pull a waitlist</b>	<p><b>Allocations &gt; Voids Available for Offer &gt; select Void Ref in Search On list and then enter void ref &gt; click Perform search.</b> If there is a <b>Y</b> in <b>Shortlist Exists</b> column, click on <b>Please Select &gt; Complete Shortlist.</b></p> <p>Click on <b>Please Select &gt; Void Details &gt; click on Context Reports</b> in <b>Actions</b> panel &gt; select <b>MSD001A</b> in <b>Report Name</b> list &gt; <b>Save</b></p> <p>Enter search parameters &gt; click <b>OK</b></p>
<b>Generate a shortlist – add restriction as needed</b>	<p><b>Allocations &gt; Voids Available for Offer &gt; select Void Ref in Search On list and then enter void ref &gt; click Perform Search &gt; click on Please Select &gt; Select Suitable Applicants &gt;</b></p> <ul style="list-style-type: none"> <li>• for <b>Business initiated transfers:</b> <ul style="list-style-type: none"> <li>○ select ‘SIT – Shortlist Housing Initiated’ &gt; add any restrictions if they apply &gt; <b>Search</b></li> </ul> </li> <li>• for <b>MSD Register:</b> <ul style="list-style-type: none"> <li>○ select ‘SCOM’ - Shortlist MSD Register &gt; add any restrictions if they apply &gt; <b>Search</b></li> </ul> </li> </ul> <p>select <b>‘SCOM’ - Shortlist MSD Register &gt; Search</b></p> <p><b>Add any restrictions</b></p> <p>Apply restrictions to the shortlist in Kotahi if property has specific characteristics (for example, property is modified or property is restricted to elderly occupants).</p> <p>Restrictions must only be added to meet specific requirements of the vacant property as this excludes those applicants from the shortlist who do not meet these specifications.</p> <p>Frequently used question reference numbers are:</p> <ul style="list-style-type: none"> <li>• 821 – minimum age</li> <li>• 805 – number of bedrooms</li> <li>• 812 – modified property</li> <li>• 817 – level access</li> <li>• 806 – MSD household numbers</li> <li>• 814 – need to moveexus</li> </ul>

Action	Kotahi path
<b>Generate Application Summary</b>	<b>Allocations &gt; Offers &gt; select Void Ref in Search On list and then enter void ref &gt; click Perform search &gt; click on Please Select &gt; Select Maintain Application Details &gt; click on Context Reports in Actions panel &gt; click on Please Select under Report Name &gt; T-365 Application Summary &gt; Save</b>
<b>Restrictions</b>	Restrictions region > click <b>Add Row</b> > click on search icon next to <b>Question Ref</b> > enter <b>Question Ref</b> > <b>Search</b> > select question > this returns you to the <b>Select Suitable Applicants</b> page > enter = in <b>Opr</b> field, <b>Y</b> in <b>Answer</b> field and then click in the <b>Select</b> box > <b>Search</b>
<b>Create manual offer</b>	<b>Allocations &gt; Voids Available for Offer &gt; select Void Ref in Search On list and then enter void ref &gt; click Perform Search &gt; click on Please select &gt; Create Manual Offer &gt; enter Respond By date &gt; enter Application Ref from the spreadsheet &gt; move the cursor &gt; click Save</b>
<b>Create shortlist offer</b>	If you are viewing the applicant in the shortlist > select <b>Create Short List Offer</b> > enter <b>Respond By</b> date > <b>Save</b> Or <b>Allocations &gt; Voids Available for Offer &gt; select Void Ref in Search On list and then enter void ref &gt; click Perform Search &gt; click on Please select &gt; Retrieve Existing Shortlist &gt; Create Short List Offer &gt; enter Respond By date &gt; Save</b> <b>Note:</b> a pop up box is displayed to confirm that an offer reference number has been created
<b>Bypass match</b>	If you are viewing the applicant in the shortlist > select <b>Create Bypass Reason</b> > enter clear comments to confirm reason > <b>Save</b> Or <b>Allocations &gt; Voids Available for Offer &gt; select Void Ref in Search On list and then enter void ref &gt; click Perform Search &gt; click on Please Select &gt; Retrieve Existing Shortlist &gt; Create Bypass Reason &gt; enter clear comments to confirm reason &gt; Save</b>
<b>Check risk profile</b>	<b>MyPortal &gt; ClientView &gt; search on client (enter search criteria) &gt; check Key Details under Customer Profile</b>
<b>Create offer stage - accept match</b>	<b>Allocations &gt; Offers &gt; enter search criteria &gt; click on Please Select &gt; Offer Details &gt; open Stages region &gt; Create &gt; Create Offer Stage &gt; select TMAP in Offer Stage Code &gt; Save</b>



Action	Kotahi path
<b>Create offer stage – advise MSD</b>	<b>Allocations &gt; Offers &gt; enter search criteria &gt; click on Please Select &gt; Offer Details &gt; open Stages region &gt; Create &gt; Create Offer Stage &gt; select MSDA in Offer Stage Code &gt; Save&gt; refresh the screen</b>
<b>Create offer stage – full offer made</b>	<b>Allocations &gt; Offers &gt; enter search criteria &gt; click on Please Select &gt; Offer Details &gt; open Stages region &gt; Create &gt; Create Offer Stage &gt; select FULL Full Offer Made in Offer Stage Code &gt; Save</b>
<b>Create offer stage – full offer accepted</b>	<b>Allocations &gt; Offers &gt; enter search criteria &gt; click on Please Select&gt; Offer Details &gt; Stages region &gt; Create &gt; Create Offer Stage &gt; select FACT Full Offer Accepted for Offer Stage Code &gt; enter expected tenancy start date &gt; Save</b>
<b>Create offer stage –reject match</b>	<b>Allocations &gt; Offers &gt; enter search criteria &gt; click on Please Select &gt; Offer Details &gt; open Stages region &gt; Create &gt; Create Offer Stage &gt; select TMRJ for Offer Stage Code &gt; Save</b>
<b>Make a note in Kotahi recording the outcome of the conversation</b>	<b>Applications &gt; Person Details &gt; open Notes region &gt; Create &gt; Create Notepad Entry &gt; enter notes &gt; Save</b>
<b>Update offer stage - decline the offer</b>	<b>Allocations &gt; Offers &gt; enter search criteria &gt; click on Please Select &gt; Offer Details &gt; under Actions click on Refuse Offer &gt; enter the reasons for decline then click Next &gt; under Refuse reason click on Please select and select the closest reason for decline &gt; enter the same comments as the previous screen and click Save &gt; in the offers screen under Actions click on context reports then click on MSD0078 &gt; Save</b>
<b>Update offer stage - withdraw offer</b>	<b>Allocations &gt; Offers &gt; enter search criteria &gt; click on Please Select &gt; Offer Details &gt; under Actions click on Withdraw Offer &gt; enter the reasons for withdrawal then click on Next &gt; under withdraw reason click on Please select and select the closest reason for decline &gt; enter the same comments as the previous screen and click save &gt; in the offers screen under Actions click on Context Reports then click on MSD0078 &gt; Save</b>

## 7.2 Information Delivery Portal (IDP) reporting

If you clicked a hyperlink to get here, press **Alt + Left Arrow** to return to your place in the procedure.

Action	IDP path
Placement Daily Allocation Report	2.5.1 Placement Operation Reports for vacant > Daily Allocation > select relevant drop down > <b>Apply</b>
Single Property View	Click lettable unit code link in Daily Allocation report

Released under the Official Information Act 1982

## 8. Document control

### Version release

Current and previous versions of this document are stored in our document management system, and are managed by the Technical Writing team. For any queries contact [busdoc@kaingaora.govt.nz](mailto:busdoc@kaingaora.govt.nz).

Version	Reason for change
6	Added details to check with customer if they wish to receive the Guide to understanding you Tenancy Agreement.

### SME review

Name	Date
Customer programme team	11 February 2022

### Endorsers

Legal		Date
Katie Armstrong	Senior Legal Counsel - Regulations	11 February 2022
Business Owner		Date
Terri Wilson	Business approval acting for Director Practice and Customer Contact	12 February 2022

### Keywords for Atamai

Suitable home right support; CT-PRO-001; CTPRO001; CT-727, CT727; applicant; tenant; placement; matching

### Information architecture

QMS Documentation > CT - Core Tenancy - Manage tenancies > 1 House applicant/tenant > CT-PRO-001 Match applicants and customers to a suitable home