



GROUP MEMBERSHIP POLICY

POLICY IMPLEMENTATION CHECKLIST	
Policy Guardian:	Chief Executive
Author:	Director of People & Governance
Version number:	3.0
Approved by Chief Executive on:	April 2016
Governing Body Approved:	April 2016
Effective from:	April 2016
Date of Last Review:	August 2024
Date of Next Review:	August 2027
Diversity compliant:	Yes
Equality Impact Assessment completed:	Yes
Data Protection compliant:	Yes
Health & Safety compliant:	Yes
Procedure implemented:	Yes
QL system changes made:	N/A
KPIs / reporting arrangements implemented:	Yes
Training Completed:	
Posted on intranet:	Yes
Posted on website:	Yes
Publicity material issued:	Yes

This document can also be provided in large print, braille, audio or other non-written format, and in a variety of languages.

1. Introduction

- 1.1 The Associations within the Caledonia Housing Association Group (“the Group”) seek a broad and representative membership across their areas of operation. The Rules of each Association define membership eligibility and govern the arrangements for admitting members, and for ending membership. This policy sets out how we apply the Rules when processing membership applications and when ending membership. It details the criteria that the relevant governing body uses to approve or decline an application. The Policy aims to ensure that each Association in the Group operates in line with its Rules and associated legal and regulatory requirements. For the avoidance of doubt, the Rules and legal and regulatory requirements, take precedence over any provision within this policy.

2. Eligibility for Membership

- 2.1 In line with Group member’s Rules, the following are eligible to become Members:
- Tenants of the Association
 - Service users of the Association
 - Other persons who support the objects of the Association
- 2.2 The Associations will consider applications from those who self-declare that they are age 16 or over. The Associations will also welcome applications from organisations sympathetic to the objects of the Association. While such organisations are free to nominate a named representative, it is expected that any representative will also be age 16 or over.

3. Equality and Diversity

- 3.1 The Group is committed to ensuring equality of opportunity and promoting diversity. Each Association publishes and makes its Rules and this Membership Policy freely available on its website. Notwithstanding this, each Association will promote membership in ways it considers appropriate to its operating context and will strive to ensure its membership reflects the communities it serves. To support this, each Association will maintain arrangements for monitoring the composition of its membership. Relevant information will be presented as part of the Annual Governance Reports to enable Governing Body members to consider and direct its membership promotion strategies.
- 3.2 Membership will be open to all those entitled to join regardless of their personal characteristics or circumstances. This includes but is not limited to age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation.

4. Applying for Membership

- 4.1 Individuals or organisations wishing to apply for membership are required to complete a share membership application form. Forms are appended to this Policy and are also available by contacting the Governance Team through the main office telephone number or by emailing Governance.Team@caledoniaha.co.uk. A copy of the form can be provided in another language or format on request. The completed application form should be signed and returned along with a one-off payment of £1.00.

- 4.2 The information provided by the applicant is used to determine eligibility. The Associations may contact applicants and make reasonable enquiries to verify the information provided.
- 4.3 Applications for membership will be considered by the relevant Association's Governing Body and each application will be considered on its own merits and in line with the Rules. Applications submitted will be considered at the next scheduled meeting of the Governing Body following receipt. If an application is received less than seven days before the next scheduled Governing Body meeting, the Governing Body has discretion to decide whether it will consider the application at that meeting. If it is not considered, the application will be considered at the next subsequent meeting.
- 4.4 No applications for membership will be considered within the 14 days preceding the date of a general meeting.

5. Approval of Membership

- 5.1 If an application for membership is approved by the Governing Body, the member will be informed by letter and provided with a share certificate. The letter will highlight Members' obligations to the organisation; and that the Rules and this Group Membership Policy are available to view and/or download from the respective Association's website, or in another format on request. Their name will be included in the Register of Members within seven working days of the meeting.
- 5.2 During the period of membership, members should expect to receive invitations to the Annual General Meeting and any Special General Meetings. These will be sent in accordance with the Rules and at least 28 days in advance of the meeting.
- 5.3 Members attending Annual or Special General Meetings are entitled to vote in accordance with the procedures laid down in each Association's Rules. Members are entitled to stand for election to the respective Governing Body and to nominate and vote in the election of Governing Body Members.

6. Refusal of Membership

- 6.1 Whilst it is both Associations' intention to encourage membership, Governing Bodies have absolute discretion in deciding on applications for membership. It is the Group's policy that membership will only be refused in exceptional circumstances, with careful consideration of the grounds for refusal outlined in the Rules. These are:
- Where membership would be contrary to the Association's Rules or policies; or
 - Where a conflict of interest may exist which, even allowing for the disclosure of such an interest, may adversely affect the work of the Association; or
 - Where the Governing Body considers that accepting the application would not be in the best interests of the Association.
- 6.2 If an application is refused, the applicant will be informed by letter giving the reasons for the refusal, and their £1.00 payment will be returned. This will be done within seven working days of the decision being made.

- 6.3 Decisions to refuse membership will be minuted and relevant supporting information retained.

7. Appeals

- 7.1 A person whose application for membership has been refused may appeal the decision.
- 7.2 Appeals should be made in writing, by letter or email, and state if a personal hearing is being requested. Appeals should be made within 10 working days of the applicant being informed of the refusal.
- 7.3 If a personal appeals hearing is requested and granted, the appellant may be accompanied by an individual of choice. Such person will have the right to speak on behalf of the appellant. The appellant should state the reasons why the application for membership should be reconsidered. Appeals will be heard by a small panel of the relevant Association's Governing Body and its decision will be final.
- 7.4 Appellants will be informed of the outcome of the decision of the Appeals Panel by letter within 14 working days of the appeal being heard.
- 7.5 If the appeal is unsuccessful, no further application for membership from that person will be considered for a period of 12 months or other period of time as may be determined by the relevant Association's Governing Body. An applicant will be entitled to reapply at that time and the application will be considered afresh.

8. Register of Members

- 8.1 Each Association will maintain a register of members in accordance with its Rules. The register will list the name, address, email address (if applicable), the date membership was entered in the register and the date at which any person ceased to be a member (if applicable), and membership number of each member.
- 8.2 Each Association will also maintain a second copy of the register showing the same details as above but not the statements of shares. This abbreviated Register of Members will be available for inspection by the respective Association's Members within 7 days of a request being made. The Group will also consider all reasonable requests from any person who wishes to inspect the abbreviated Register.
- 8.3 All requests must be in writing addressed to the Secretary and stating the reasons for inspection. The inspection itself will take place in an appropriate nominated location, at a mutually convenient time and date and with staff in attendance. In all cases, in making the registers available, due regard will be had to data protection principles and the Group's responsibilities to safeguard the personal information of individuals named on the register.

9. Ending Membership

- 9.1 In accordance with the relevant Association's Rules membership of the Association may be ended in the following ways:

- a) Writing to the Secretary at the registered office giving 7 days' notice of intention to resign.
- b) The Governing Body being satisfied that a member has failed to inform the organisation of a change of address within three months of moving.
- c) If the member has failed to attend, submit apologies, exercise a postal vote or appoint a representative to attend and vote on their behalf by proxy for five consecutive Annual General Meetings.
- d) If, as a result of a complaint, two-thirds of the members vote at a Special General Meeting to expel the member.

9.2 The Governing Body may also consider ending membership in light of any substantiated information regarding an individual's eligibility for membership. This would include information or circumstances that would preclude the member from applying to become a member or constitute grounds for refusal had it been known at the time of application.

9.3 In relation to points b) and c) above, members will be reminded of these provisions within the invitation to Annual General Meetings.

9.4 The Group recognises its Governing Body members have no powers to exercise discretion or take any other circumstances into account other than those outlined above, in considering the ending of memberships.

9.5 For clarity, individuals representing an organisation that is a member of the Association may not be individual members in their own right. Representatives of organisations who are already individual members will have their individual membership suspended whilst they represent that organisation.

10. Data Protection

10.1 The Caledonia Group regards privacy as important and any personal information supplied will be used in accordance with applicable data protection laws. Any information will only be used for the reasons specified in this Policy and as detailed in the Group Customer Privacy Notice. Information will only be shared with third parties for the purposes listed in the Privacy Notice.

11. Compliance Statement

11.1 *It is important that all members of staff, in carrying out their duties for the Group, do so in accordance with the Group's policy framework. Our policy framework ensures we comply with laws and regulation, while giving guidance to inform operations and decision-making. Our policies have been designed to be clear and easy to understand, and are available on our website and intranet. If any member of staff is unclear as to their responsibilities under this policy, then they should refer to their line manager and/or the policy author for further guidance. A failure to comply with Group policies can have serious consequences for the Group. Should an employee become concerned about serious non-compliance with the policy, they should speak to their line manager or refer to the guidance set out in the Group Whistleblowing policy.*



APPLICATION FOR MEMBERSHIP

Please complete this form by entering your details in the space provided. Once completed, please return the form, together with the sum of £1.00 to:

Caledonia Housing Association
Suite 4, Saltire House
Whitefriars Crescent
Perth
PH2 0PA

DATA PROTECTION

Caledonia Housing Association is committed to protecting and respecting its' members' privacy. We ensure that we comply with applicable data protection law when we process your personal data. Our full Privacy Notice explains how your personal data will be processed, from when it is collected until it is disposed of. It also explains how your personal data is used, when it will be shared with others and how it will keep be kept secure. Our Privacy Notice can be viewed on our website at www.caledoniaha.co.uk. Alternatively, a hard copy can be made available on request.

Name	
Address	
Telephone	
	Email
Date of Birth	
I hereby apply to become a member of Caledonia Housing Association. I enclose the sum of £1.00.	

Please complete the Equalities Monitoring Form overleaf.

EQUALITIES MONITORING FORM

Caledonia operates a non-discriminatory Membership Policy. In order to monitor the effectiveness of this Policy and our Equality, Diversity & Inclusion Policy, it would be helpful if you would provide the following information. It will be used to help us monitor whether our membership is representative of the communities we serve. Completion/non-completion will not affect your application.

1	What is your age?					
	18 – 24 years	☐	55 – 64 years	☐		
	25 – 34 years	☐	65 – 74 years	☐		
	35 – 44 years	X	75 + years	☐		
	45 – 54 years	☐	Prefer not to say	☐		
2	Do you consider yourself to have a disability?					
	Yes	☐	No	☐	Prefer not to say	☐
3	What do you consider your gender to be?					
	Male	☐	Female	☐	Non-Binary	☐
	Trans Male					☐
	Trans Female	☐	Prefer not to say			☐
If you would prefer to use your own term, please specify here						
4	What do you consider your religion or belief to be?					
	Buddhist	☐	Jewish	☐	None	☐
	Christian	☐	Muslim	☐	Other	☐
	Hindu	☐	Sikh	☐	Prefer not to say	☐
5	What do you consider your sexual orientation to be?					
	Heterosexual	☐	Gay man	☐	Other	☐
	Bisexual	☐	Lesbian / Gay woman	☐	Prefer not to say	☐
6	What do you consider your ethnic origin to be?					
	White:					
	Scottish	☐	Irish	☐	Northern Irish	☐
	British	☐	Welsh	☐	Gypsy Traveller	☐
	English	☐	Polish	☐	Any other white ethnic group	☐

Mixed or Multiple Ethnic Groups (Please state):						
Asian, Asian Scottish or Asian British:						
	Pakistani	☐	Pakistani Scottish	☐	Pakistani British	☐
	Indian	☐	Indian Scottish	☐	Indian British	☐
	Bangladeshi	☐	Bangladeshi Scottish	☐	Bangladeshi British	☐
	Chinese	☐	Chinese Scottish	☐	Chinese British	☐
	Other Asian Ethnic Group		☐			
African, Caribbean or Black:						
	African	☐	African Scottish	☐	African British	☐
	Caribbean	☐	Caribbean Scottish	☐	Caribbean British	☐
	Black	☐	Black Scottish	☐	Black British	☐
Other Ethnic Group:						
	Arab	☐	Arab Scottish	☐	Arab British	☐
	Other (Please state)					
	Prefer not to say		☐			



APPLICATION FOR MEMBERSHIP

Please complete this form by entering your details in the space provided.

Once completed, please return this form, together with your £1, to our office, as per the address on the back of this leaflet.

Data Protection

Cordale regards privacy as important and any personal information given to us will be used in accordance with the Retained UK General Data Protection Regulation (UK GDPR) and the Data Protection Act 2018 . Any information provided will only be used for the reasons specified, and it will not be shared with any third party without consent unless required by law.

Name:

Address:

Postcode:

Occupation:

Telephone:

Email Address:

Date of Birth:

I hereby apply to become a member of Cordale Housing Association.

I enclose the sum of £1.00.

Signature: **Date:**

167 Main Street, Renton, G82 4PF Tel: 01389 721216

Email: info@cordalehousing.org.uk Website: www.cordalehousing.org.uk



Equal opportunities monitoring

We would be grateful if you would provide the following information. It will be used to help us monitor whether our membership is representative of the communities we serve. Completion will not affect your application.

AGE:

SEX:

MALE ☐

FEMALE ☐

ETHNICITY: How would you describe your ethnic origin? Please circle from numbers below.

Black – Caribbean ☐

Bangladeshi ☐

Black – African ☐

Chinese ☐

Black – Other ☐

White ☐

Indian ☐

Arab ☐

Pakistani ☐

Other ethnic background ☐

DO YOU CONSIDER YOURSELF TO HAVE A DISABILITY:

YES ☐

NO ☐

EMPLOYMENT/OCCUPATION:

VOLUNTARY/WORK EXPERIENCE/OTHER RELEVANT SKILLS:

HOW DID YOU BECOME AWARE THAT YOU ARE ENTITLED TO BECOME A MEMBER OF CORDALE - PLEASE TICK.

- ☐ Through a member of staff
- ☐ On Tenancy sign-up
- ☐ Through a public meeting/public information
- ☐ From Cordale's newsletter or other Cordale publication
- ☐ Cordale website
- ☐ Other (Please give details)

167 Main Street, Renton G82 4PF Tel: 01389 721216

Email: info@cordalehousing.org.uk Website: www.cordalehousing.org.uk