Hartrigg Oaks

Hartrigg Oaks is a retirement village with a difference. Based on the Continuing Care Retirement Community model aimed at maintaining independence throughout later life, at Hartrigg Oaks we provide a home for people aged 60-plus. It is suitable for young retirees through to older people who need specialist nursing care. It offers:

- High quality modern bungalows, designed with easy access and to accommodate adaptations.
- A dedicated team providing support and personal care to residents in their own home.
- A conveniently located on-site care centre (called The Oaks) providing full residential and nursing care on a short-term or long-term basis.
- An extensive range of leisure facilities and social activities.
- Unique pooled-finance options. This means that a need for support does not lead to an increase in fees, even when in receipt of residential or nursing care.

Since opening in 1998, Hartrigg Oaks has been highly acclaimed as an ideal solution for people who want to plan for the future and enjoy life today.

The Joseph Rowntree Housing Trust

Hartrigg Oaks is owned and managed by the Joseph Rowntree Housing Trust (JRHT). JRHT is a charity and registered social landlord, with a history stretching back over a century to its founder, Joseph Rowntree.

In addition to owning a large stock of general housing, JRHT has specialised in the provision of housing and support services for older people for many years. This now includes a mixed-income retirement village in Hartlepool, ‘extra care’ and sheltered housing facilities in Scarborough, Leeds and York, and four care homes.

Location

Hartrigg Oaks is located on the edge of the Edwardian garden village of New Earswick, within three miles of the centre of historic York.

New Earswick was created by Joseph Rowntree, a successful York-based Quaker businessman and philanthropist, in 1902. Its aim was to provide good quality homes in a healthy and attractive environment. Today it is a thriving community, with over 1,000 homes and a range of amenities including a parade of shops, library, swimming pool, Folk Hall and school. In addition, there are good transport links, providing easy access to York city centre and nearby Haxby village.

Quality homes

Hartrigg Oaks has 152 spacious bungalows. These are spread over a 21-acre site, which has lots of open space and beautifully landscaped gardens for residents to enjoy.
There are four property types, many of which benefit from a roof conversion, which provides a useful space for an additional bedroom or office.

<table>
<thead>
<tr>
<th>Type</th>
<th>No of Bedrooms</th>
<th>Total size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rigg</td>
<td>1</td>
<td>54 Msquared</td>
</tr>
<tr>
<td>Rigg Plus</td>
<td>1 plus a loft conversion</td>
<td>87 Msquared</td>
</tr>
<tr>
<td>Hart</td>
<td>2</td>
<td>79 Msquared</td>
</tr>
<tr>
<td>Hart Plus</td>
<td>2 plus a loft conversion</td>
<td>112 Msquared</td>
</tr>
</tbody>
</table>

Each bungalow contains:
- Lounge/diner,
- Easy-to-maintain kitchen,
- Large bedroom. Two-bedroom bungalows have an additional shower room,
- En-suite master bedroom,
- French door leading to individual garden,
- Emergency call system, which also acts as an intruder alarm.

All properties come with an outdoor workshop/storage area and with the option of an allocated parking space.

Hartrigg Oaks is built to the nationally recognised ‘Lifetime Homes’ standard, which means that our properties are suitable for people of all ages and are flexible to changing needs. For added peace of mind, Hartrigg Oaks has CCTV cameras in operation and bungalows have enhanced security features.

**Living life to the full**

Hartrigg Oaks boasts a vibrant and neighbourly community and for those people who have no intention of slowing down in retirement, there is plenty to do!

There are over 50 different regular social activity and interest groups, most of which are organised and run voluntarily by residents. From table tennis to art, play-reading to bridge, there is something to suit every taste.

The social hub of Hartrigg Oaks is The Oaks Centre, where an impressive range of communal facilities are available to enjoy:
- restaurant,
- coffee shop,
- fully equipped and staffed gym with spa pool,
- library,
- arts and crafts room,
- DIY workshop,
- IT facilities,
- hair salon,
- small shop,
- various games, leisure and meeting rooms.
There are also two en-suite guest rooms available for visitors and a communal people-carrier, which is used for shopping trips and excursions.

Although there are extensive opportunities to mix socially at Hartrigg Oaks, personal choice means each resident can enjoy the lifestyle they choose at a pace they are comfortable with, and be as private as they wish.

**Health and wellbeing**

At Hartrigg Oaks we aim to provide an environment where each individual can maximise their independence and social wellbeing.

It is important, as people get older, to know that if they need support, it will be available and provided by people they trust. The Joseph Rowntree Housing Trust (JRHT) has extensive experience of providing care and support for older people and all our carers, nurses and other health professionals are fully trained and qualified.

We offer a comprehensive range of services that promote good health, as well as providing support and care when needed. This includes:

- advice on diet and exercise,
- domiciliary support in residents own home, including home help and personal care,
- residential and nursing care, on either a respite or long term basis (see section on The Oaks).

On joining Hartrigg Oaks, each person enters into a Care Agreement with JRHT. The agreement entitles them to up to 21 hours of domiciliary care per week in their own home, as well as accessing the services of The Oaks, if necessary (based on assessed needs).

JRHT is registered with Care Quality Commission (CQC), which carries out regular audits and inspections.

**The Oaks**

The Oaks, situated within The Oaks Centre, is an integral part of the Hartrigg Oaks community and is suitable for people who need higher levels of care than can be provided in their own home. It is registered to provide residential, nursing and dementia care.

In providing services, we respect each resident's right to dignity and choice. We carry out regular person-centred assessments that take into account all aspects of an individual's life, to ensure that we provide the best possible care and support. The Oaks has 42 spacious bed-sitting rooms, which are all en-suite with level-access showers, and most have a French door leading out onto a balcony or patio. Three of the rooms are reserved for residents who require a short stay, for example following a period of illness, or early discharge from hospital.

In addition to having its own dedicated facilities, including lounge, activity area, dining room and rose garden, The Oaks is ideally located for access to the main communal facilities. This means residents who move from their bungalow to The Oaks can still enjoy the same activities and social links. It is also conveniently placed for a partner or neighbours living at Hartrigg Oaks to Visit.

The Oaks has 42 private rooms, each of which has:

- own front door, fitted with entrance bell,
- bed-sitting area,
- en-suite facilities with level-access shower,
• french door, opening onto a balcony or paved patio area,
• television and phone points,
• emergency call system.

Person centred care and support is provided in The Oaks by a dedicated team of qualified nurses and carers.

We ensure that your social wellbeing and individual wishes are fully taken into account when planning your care and that your right to have dignity, respect and choice is maintained. A benefit of living at Hartrigg Oaks retirement village is that you have access to health professionals across a number of areas.

Our comprehensive range of services include:
• care and support including specialist nursing care,
• diet and nutrition advice, with special diets catered for,
• exercise programmes (including rehabilitation), for people of all abilities.

Flexible financial options

People who join Hartrigg Oaks pay two fees and are able to select the best combination to suit their circumstances. It is also possible to select a combination of any of these three options.

• **Residence Fee** - is paid by each household. It provides for the leasehold of a bungalow and accommodation in The Oaks, if required.

  Option 1: Fully Refundable. A one-off payment, based on the market value of the bungalow. It is refunded in full when the resident leaves Hartrigg Oaks.

  Option 2: Non-Refundable. A one-off payment (lower than the fully refundable option), which is not returned when the resident leaves Hartrigg Oaks (unless this occurs within five years of joining, in which case a partial repayment is made). The amount paid is related to the market value of a bungalow, an individual’s age on joining, and the length of time it is expected that they might live at Hartrigg Oaks.

  Option 3: Annualised. A yearly sum payable monthly and subject to annual increases.

• **Community Fee** - is an annual charge paid by each resident monthly. It covers the cost of bungalow maintenance, the upkeep of the communal areas and the entitlement to receive care and support, if needed. Hartrigg Oaks offers innovative pooled finance options (options 1 and 2 below), that allow residents to receive care and support without any increase to their fees.

  Option 1: Standard. This covers all services including care and support. It is based on age on joining Hartrigg Oaks; the younger the person is, the lower the fee.

  Option 2: Reduced. Based on the same provision as the Standard Fee, an initial lump sum payment can be used to reduce the annual charge. As with the Non-Refundable Residence Fee there is no refund when a resident leaves, unless this occurs within five years of joining Hartrigg Oaks.

  Option 3: Minimum (sometimes referred to as Fee for Care). An annual charge is paid for services but not care and support, which is charged for as and when received. Couples receive a 12.5% discount on the second person’s Community Fee.
Applying to join

Hartrigg Oaks is an extremely popular retirement option and as such maintains waiting lists (referred to as reserve lists) for each of the four property types.

A mailing list has been set up for anyone who wishes to note their interest in Hartrigg Oaks. The people on the mailing list are given the opportunity to apply to join the reserve lists when they are opened, for a limited period, usually every two years. The number of places available is based on an estimate of how many vacancies we expect during the following 24 months.

If more applicants are received than there are place available, places are allocated using the following criteria:

- Priority is given to couples for the application of the Hart and Hart Plus bungalow types.
- Priority is given to applicants in ascending order of age (subject to a minimum age of 59); for couples, the average age is calculated.

All places offered on the reserve lists are subject to the applicant satisfying our health and care criteria, providing a financial statement confirming they can meet the financial commitment and paying a deposit.

Your guide to the health and care check procedure for application to the reserve lists

This explains the health and care check policy and procedures, which form part of your application to join Hartrigg Oaks.

The ‘acid-test’ of the health and care check criteria is whether your need for care and support in future years is likely to be greater than would be expected for an individual of similar age.

The list below (not exhaustive) indicates some of the conditions that have led to health check failure in the past:

- regular oxygen therapy
- poor short-term memory
- Dementia
- history of heart failure
- mobility of less than half a mile
- certain cancer treatment within the last five years
- imminent major surgery
- history of transplant
- Rheumatoid arthritis
- Osteoarthritis
- significant psychiatric history
- history of significant stroke
- Parkinsons disease
All applications are considered on an individual basis. This means that having one or more of the above conditions will not necessarily lead to an application being unsuccessful. Unfortunately we are not able to accept applications from people who have been diagnosed as having dementia, due to the likelihood of requiring care or support in the future.

Stage 1: initial health and care check assessment
If you are offered a place on a reserve list, it will be subject to successfully completing a health and care check assessment. This involves the following stages:

Questionnaire (completed by you)
We will ask you to complete a confidential health questionnaire. This asks questions about your general health, medical history and any assistance that you may require in carrying out activities of daily living (eg. help with housework or personal care). The completed questionnaire is passed to two members of our care management team; Care Services Manager and Deputy Care Home Manager (The Oaks).

Health and care assessment (at Hartrigg Oaks)
Once we have received your completed questionnaire, we will ask you to see one of our nurses for a physical and mental health assessment. They will use the questionnaire you completed for guidance and will discuss with you any support needs you might have. The nurse will compile a report, which will be sent to JRHT’s appointed GP (Haxby Medical Group), along with your questionnaire.

Questionnaire (completed by your GP)
With your permission, Haxby Medical Group will send a questionnaire to your GP, which asks questions about your health and medical history.

Assessment of Information
Haxby Medical Group will use all of the information (above) to make the assessment:

- If your future care and support needs are not expected to be greater than an individual of similar age, then you are deemed to meet the criteria and your position on the reserve list is confirmed.
- If your future care and support needs are considered to be greater than an individual of a similar age, then unfortunately you are deemed not to meet the health criteria for joining Hartrigg Oaks and the application is declined.
- Haxby Medical Group does not share the reasons for this decision with members of JRHT, in order to protect your right to confidentiality. They will, of course, give you a full explanation, if requested.

Outcome of Assessment
We will write to you when we have received Haxby Medical Group’s response. This can be up to 10 weeks from the start of the process.

Stage 2: follow-up health and care check
When you have been allocated a bungalow, a follow up health and care check is carried out.
If you have been on the reserve list for less than two years, this involves Haxby Medical Group writing to you for an update on any changes to your health or need for care and support since the initial health and care check. If there have been any changes – no matter how minor – you should provide details to Haxby Medical Group.

If you have been on the reserve list for two years or more, all the stages of the initial health and care check are repeated.

Once Haxby Medical Group has assessed the information provided, if you are considered to still meet the health and care check criteria your application will proceed.

If you no longer meet the health criteria you can still join Hartrigg Oaks, but your terms of entry will be limited to the Fee for Care Community Fee option. This is payment for services only (eg. upkeep of communal facilities, buildings insurance, landscaping and so on), but not the cost of care and support, which will be payable on receipt of services.

However, if appropriate, you may be eligible to have a final follow-up health and care check within a year of joining Hartrigg Oaks.

**Stage 3: final health and care check**
An additional and final follow-up health and care check is available to those residents who did not meet the health and care check criteria at Stage 2, as a result of ongoing medical treatment. This is subject to Haxby Medical Group agreeing that a time-delay of up to 12 months will make a prognosis and assessment decision clearer. The health and care check must be carried out no later than one year from the date of the follow-up health and care check.

If the resident is considered to meet the health and care check criteria, then he/she may transfer to the Standard or Reduced Community Fee option.

If Haxby Medical Group is unable to agree that the resident meets the health and care check criteria, then they will remain on the Fee for Care Community Fee.

This optional final follow-up health and care check is not available to incoming residents aged over 70 who meet the follow-up health and care check criteria, but who wish to join on the Fee for Care Community Fee option for one year and then transfer community fee options.

**General FAQs**

**Is the deposit paid to join the reserve lists refunded in full when an application does not proceed?**
If your application is withdrawn as a result of not meeting the health and care criteria, your deposit will be refunded in full. If you choose not to join, because your terms of entry have been limited to the Fee for Care Community Fee option, then you will only get back half of the deposit you paid. However, if you withdraw your application after you have accepted the offer of a bungalow then you will forfeit your deposit.

**What happens if I am considered not to meet the health and care check criteria, but I do not agree with the decision?**
Haxby Medical Group is willing to discuss the outcome of the assessment with you and/or your GP. If you are still unhappy with the decision – at Stages 1 and 2 – you can appeal against it.
This may involve a full medical carried out by Haxby Medical Group. However, there is no right of appeal following Stage 3 (final health and care check).

**What if I do not disclose all relevant health information?**

It is very important that you answer fully and truthfully all questions asked about your health, in the same way as you would if you were making an application for health insurance. In addition, should there be any changes to your health between the period of your follow-up health and care check (Stage 2) and joining Hartrigg Oaks, you must notify us immediately. Failure to do the above could impact on your chosen Community Fee option.

### Reserve list procedure when applying for a bungalow at Hartrigg Oaks

**Mailing List**

A Hartrigg Oaks mailing list has been set up for anyone who is interested in joining Hartrigg Oaks. Those people on the mailing list will be given the opportunity to apply to join the reserve lists when they are opened periodically.

Please note that the mailing list is a note of interest in joining Hartrigg Oaks. It does not guarantee the offer of a place on any of the reserve lists.

**Reserve lists**

Hartrigg Oaks is fully occupied. However, a reserve list is kept for each type of bungalow. The number of each type of bungalow and the number of places available on each list is indicated below:

- **63 Hart Plus and Rigg Studio*** — 10 places** (two-bedroom bungalow with room in the roof/one-bedroom bungalow with a room in the roof and additional study room).
- **24 Hart** — four places** (two-bedroom bungalow).
- **44 Rigg Plus** — six places** (one-bedroom bungalow with room in the roof).
- **19 Rigg** — three places** (one bedroom bungalow).

* *there are only two bungalows of this type.*

The size of the lists is based on an estimate of how many vacancies we expect to arise during the following 24 months and the difference in numbers reflects the total number of each bungalow type. There is no guarantee of when vacancies will actually arise or how frequently. When all available places have been allocated, which is approximately two weeks after the closing date for applications, unsuccessful applicants will be advised. You are free to apply again next time the lists are opened but no priority is given.

**Applying for the reserve list**

When JRHT needs to replenish the reserve lists, an application form will be posted to all those on the mailing list. Anyone wishing to apply should fill in the form and return it to JRHT by the specified date. It will not be possible to apply to join the lists at any other time. JRHT allocates places on the lists on the following basis:

- priority is given to couples for Hart and Hart Plus bungalows,
- priority is given to the youngest applicants (subject to a minimum age of 60); for couples, the average of their ages is calculated.

Once allocated a place on the reserve list, the positioning is by age in descending order.
Before a place on the lists is confirmed by JRHT, the following three steps are taken:

- The health and care process has to be completed. This stage is very important. If you do not meet the health criteria then you will not be able to join Hartrigg Oaks. Please read the health and care check section thoroughly.
- A confidential financial statement form is completed by applicants.
- A deposit of £2,000 is paid by applicant. This is offset against the Residence Fee on the subsequent purchase of a bungalow at Hartrigg Oaks.

Allocation of vacancies
When a bungalow vacancy arises, an offer is made to the person whose name is at the top of the reserve list for the relevant type of bungalow. Two weeks are given for consideration of the offer. If the offer is declined, the person will remain at the top of the list until another vacancy arises. The vacancy which has been declined is then offered to the second person on the relevant list.

If a person turns down a second offer, their name is removed from the reserve lists altogether. Once a bungalow offer has been accepted, the reservation is held for four months and completion can take place any time during this period.

Flexibility
JRHT reserves the right after consultation with the officers of the Residents’ Committee to vary the terms of this procedure if undue delays are being experienced in filling a vacancy.

General FAQs
Is there an upper age limit on joining the reserve lists?
No, but priority is given to the youngest applicants. Therefore the younger you are when you apply to join Hartrigg Oaks, the greater your chances of success, as we nearly always receive more applications than there are places available on the lists.

Can I/we apply for more than one list?
Yes. The four reserve lists are treated as individual lists, distinct from each other and you can apply for as many as you choose. If your preference is for a certain bungalow type, but you would consider a different bungalow type - if your first choice was unsuccessful - then you should apply for that type as well. This will give you the greatest chance of being successful. If you are offered a place on more than one of the lists, you can decide whether to only accept your preferred choice or them all.

If you accept the offer of a place on more than one of the lists, you will still only be able to turn down a total of two offers, following which we will remove your name(s) from all the lists you may be on.

As places on the reserve lists are given to the youngest people who apply, why are the positions then prioritised by age in descending order?
All the people on the reserve lists are joining Hartrigg Oaks and so it makes sense for those who are slightly older to be allocated a bungalow first.

If I/we are allocated a place on a list, is it transferable?
No. You will only be allocated a place on the list(s) where you have successfully met the prioritisation criteria.
Are bungalows offered internally first?
Yes. We have a transfer policy where an existing resident may move to another bungalow before the reserve list procedure is operated. If so, the procedure will then apply to the vacated bungalow.

Can I/we add the roof conversion to a bungalow?
Possibly. It is permitted for a room in the roof to be installed in some of the bungalows, which do not currently incorporate this facility. This is dependent on the structure of the bungalow and is subject to you paying the appropriate charge. If you specifically want a bungalow with a room in the roof, then you should only apply for the Rigg Plus/Hart Plus reserve lists, or you may be offered a bungalow without a room in the roof, that due to structural reasons cannot be converted.

What happens to the £2,000 deposit if I/we have to withdraw from the reserve list or are unable to complete the purchase of a bungalow offered?
If you withdraw from the reserve list, or have your details removed having turned down two bungalow offers, a refund of half of the £2,000 deposit is made. However, if you accept the offer of a bungalow, but then fail to complete the purchase (or take up the temporary rental option) then none of the deposit is repaid.

Why is priority given to couples in the allocation of places on the Hart and Hart Plus Lists?
These are larger than the Rigg and Rigg Plus bungalow and are therefore more suitable for two-person households. It also helps to ensure that the Hartrigg Oaks community remain balanced between couples and single people. As such, if we do not receive enough applications from couples to allocate all the available places on the Hart Reserve list, couples who unsuccessfully applied for the Hart Plus Reserve list (only) would be given priority over single applicants and vice versa for the Hart Reserve list.

Why do you give priority to the youngest applicants?
Because Hartrigg Oaks is based on a unique pooled-finance model to pay for care and support, it requires a well-balanced community in terms of age range. As the resident population ages each year, this balance can only be maintained by a high proportion of the new residents being young-retired.

What happens if I/we are unable to complete purchase during the four-month reservation period because we haven’t sold our own home?
A temporary rental option is available for up to three years.

Continuing care retirement community bursary scheme

The bursary scheme gives 10 households already living in homes owned by JRHT the opportunity to live at Hartrigg Oaks. It is available to people aged 60 plus (single or part of a couple) who live in JRHT housing, either on a rental or shared-ownership tenure.

People who join the Bursary Scheme become Hartrigg Oaks residents and benefit from:

- Living in a spacious bungalow, which has been built to a high standard and is fully accessible.
• Access to extensive on-site communal facilities.
• The opportunity to join social activities and interest groups.
• The availability of support provided by the on-site Community Care Team. This can be up to 21 hours per week, based on assessed needs.
• Residential or nursing care in The Oaks.

Charges
There are two parts to the monthly charge payable by members of the bursary scheme.

Rent: this is calculated in accordance with JRHT’s standard rent-setting policy. This is reviewed on 1 April each year and up until 31 March 2020 is set at £351.09 per calendar month for a one bedroom bungalow and £401.83 per month for a two bedroom bungalow. If you part-purchase your bungalow, then the rent would be reduced relative to the percentage purchased.

Service Charge: this is a contribution to the cost of providing communal services to the community and is paid by each resident. This entitles you to:

- use of all the leisure facilities, including full use of the health activity centre at no extra cost,
- meals in the restaurant and coffee shop at reduced ‘resident’ rates,
- access to up to 21 hours of care and support services in your own home per week, based on assessed needs*
- access to residential or nursing care in The Oaks*
- the provision of an emergency call system.

*Care and support services, including residential and nursing care, are paid for separately, please see below.

The service charge is reviewed on 1 April each year and up until 31 March 2020 is £87.29 per calendar month for a single person and £76.40 per month for each member of a couple.

Paying for care and support services
Care and support services, provided as part of a care plan, are payable on receipt of services, invoiced on a monthly basis. Listed on page below is a guide to current charges.

If you require care and support, the Community Care Team will carry out an assessment with you and agree a personal care plan, including details of costs.

<table>
<thead>
<tr>
<th>Home Help Services</th>
<th></th>
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<tbody>
<tr>
<td>Including laundry, cleaning and shopping</td>
<td>£10.85 per hour</td>
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<table>
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<tr>
<th>Care Services</th>
<th></th>
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<tbody>
<tr>
<td>Service</td>
<td>Rate</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>--------------------</td>
</tr>
<tr>
<td>Including assistance with dressing, bathing, medication and mobility</td>
<td>£16.15 per hour</td>
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<tr>
<td><strong>Nursing Services</strong></td>
<td></td>
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<tr>
<td>Including assistance with medication and dressings</td>
<td>£21.80 per hour</td>
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<tr>
<td><strong>Mid-day meal Delivery Service</strong></td>
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<tr>
<td></td>
<td>At menu cost plus £4.00 delivery</td>
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<tr>
<td><strong>Massage Services</strong></td>
<td>Prices available from the Health Activity Centre</td>
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<tr>
<td><strong>Handyman Services</strong></td>
<td>£21.80 per hour</td>
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<tr>
<td>Including fixtures, repairs, decoration</td>
<td></td>
</tr>
<tr>
<td><strong>Gardening Services</strong></td>
<td>£10.85 per hour</td>
</tr>
<tr>
<td><strong>Residential Care at The Oaks</strong></td>
<td>£722.29 per week</td>
</tr>
<tr>
<td><strong>Nursing Care at The Oaks</strong></td>
<td>£983.13 per week (Including Common Contribution)</td>
</tr>
</tbody>
</table>

**Help to meet the charges**

If you are already in receipt of Housing Benefit, both the rent and service charge payable are likely to be covered by this. If you are not currently entitled to Housing Benefit, you may become eligible on joining Hartrigg Oaks, if the charges are higher than you currently pay.

You may also be eligible for financial support to help meet your care and support costs, some of which may not be means-tested, for example Attendance Allowance and NHS Nursing Care Contribution.

If you require financial support, which is means-tested, then we can help arrange an assessment with City of York Council (COYC). If you qualify for financial support from COYC, they will determine an amount which you are expected to contribute, as well as specifying their contribution. The Bursary Scheme will meet the difference between the cost of care and support assessed by JRHT and the contribution made by you and COYC.
If you wish to discuss financial support in more detail, we can arrange an appointment with a JRHT Money and Benefit Adviser.

**Eligibility criteria and submitting an application**
To be eligible to join the bursary scheme, applicants must:

- be aged 60 or above,
- have been a JRHT tenant and / or leaseholder for a minimum of five years.

Only couples are eligible to apply for two-bedroom (Hart) bungalows.

Any offer of a bungalow at Hartrigg Oaks is subject to you meeting the health and care check criteria.

**Noted interest**
We do not keep a waiting list for places on the bursary scheme. This is because it can take several years for a bungalow to become available for re-let / shared-ownership.

However, people who are interested in joining the bursary scheme can register their interest by completing a note of interest form.

**Submitting an application**
When a bungalow becomes available for re-let / shared-ownership, we will write to all the people who have noted their interest and are eligible to apply, inviting them to submit an application by a specified closing date.

Points will be awarded to each application according to age, length of residency and size of current property (see below). The application with the most points will be offered the bungalow. Should two or more applications receive the same number of points, the bungalow will be offered to the youngest applicant (in the case of couples, this will be based on their average age).
Health and care check
All people who join Hartrigg Oaks are required to satisfy the health and care check criteria. Therefore, if you are offered a place on the bursary scheme you will be required to undertake a full health and care check assessment.

General FAQs

Is any priority for joining the bursary scheme given to applicants already living in New Earswick?
No. Bungalows are allocated based on the points-based system.

If I do not meet the health and care check criteria can I still join Hartrigg Oaks?
Unfortunately not, as this is a requirement made of all residents.

Some bungalows at Hartrigg Oaks have had a conversion to create an additional room in the roof. Can I have a bungalow of this type?
In order to maximise the financial resources set aside by JRHT to operate a bursary scheme, we do not choose bungalows with a roof conversion, as they have a higher capital cost. Therefore, you would only be able to have a bungalow of this type if a) the bungalow design is suitable for a roof conversion and b) you met the full cost of the conversion, as paid by non-scheme members: circa £53,000 or £309.20 per calendar month, based on 2019-2020 prices.

How many of the 10 bungalows used for the Bursary Scheme have two bedrooms?
There are two two-bedroom (Hart) bungalows. However, some of the one-bedroom (Rigg) bungalows can have a roof conversion to create an additional room (as detailed above), which can be used as a second bedroom.
For further information please contact:

General Manager
Hartrigg Oaks
Haxby Road
New Earswick
York YO32 4DY

Tel: 01904 750700
Email: OaksReceptionists@jrht.org.uk
## PERSONAL DETAILS

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## CONTACT DETAILS

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How did you find out about Hartrigg Oaks (Please tick relevant box)
Word of mouth (eg. through a friend or relative) □
By passing the site □
Advertisement □ Please list publication ..........................................................
Website □ Please list name of website ..........................................................
Other □ Please give details ...........................................................................

Signed: ................................................................. Date: .................................................................
Signed: ................................................................. Date: .................................................................

Thank you for registering your interest in Hartrigg Oaks. Please note that membership of the Mailing List does not constitute an application to join Hartrigg Oaks, nor can we guarantee that you will be offered a place on the Reserve Lists (waiting lists) in the future. Please read the section on the reserve list procedure for further details.

Privacy Statement

We know that keeping your information safe is vital therefore we will collect, process, store, share and dispose of the data you have provided in this application safely and securely. We require the information to provide the information you have requested from us.

We store data about everyone interested in our services in paper based & electronic formats and have procedures in place to prevent unauthorised access to, use of or disclosure of your information. You may request access to the information we hold about you at any time. If you require further information regarding the way we will use your information please speak to Hartrigg Oaks General Manager or see our full Privacy Notice which can be found at: www.jrht.org.uk/privacy-notice-care-services