



Group Tenancy Change Policy

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Last reviewed – August 2026

Version: 1.0

Approval body	Caledonia Management Board
Date of approval	13 August 2026
Date of next policy review	August 2029
Customer engagement required	N/A
Your Voice engagement required	To be informed
Equality Impact Initial Assessment completed	Complete
Full Equality Impact Assessment required	Complete
Data Protection Risks Assessed	
Health and Safety Risks Assessed	
Sustainability Impacts Assessed	
Procedures Updated	
Date Procedures Last Reviewed	
Data Impacts / IT System Changes Assessed	
Training Needs Assessed	
Previous Policy Version	N/A
New Policy Version	N/A

Equality Impact ~ Initial Assessment

1. People responsible for carrying out this assessment			
Policy Owner:	Regional Manager (R1)		
EQIA Assessor(s):	ODBP, Business Analyst, Governance Officer		
Name of Policy:	Group Tenancy Change Policy		
Date of last EQIA:	New Policy		
2. Purpose, aim(s) and expected outcomes (including who will benefit):			
This is a review of existing policies which have been combined into one policy. The new policy sets out the Group's responsibilities in relation to the handling of various types of tenancy change. The policy supports the Group's commitment to customer service and placing the Customer 1 st by ensuring that tenant requests for changes to their tenancy are properly managed and acted upon.			
3. Is there a direct impact on people, or how the service is delivered?			
It is our intention that all tenants benefit from this Policy, as it provides consistency on how we manage requests for tenancy changes.			
4. Potential impact on diverse communities, customers or groups?			
The complexity of tenancy legislation and the difficulty in understanding individual rights may create barriers for some groups when applying for a change in tenancy. This could disproportionately affect applicants who are less familiar with legal processes or who require additional support. Implementing clear, accessible procedures and providing appropriate guidance will help minimise these barriers and reduce any potential negative impacts on protected groups.			
5. Is there a Positive or Negative impact?			
Positive	☒	Which groups does it impact?	The policy raises awareness of the change of tenancy options available and the support in place to apply for these.
Negative	☐		
Neutral	☐		
6. Details of any engagement activities carried out			
Policy is driven by legislation.			
7. Overall Impact Rating			
Material impact		☐	Non-material impact ☒
8. Initial Assessment Findings and Recommendation			
Initial Assessment Only		☐	Full EQIA Required ☒
9. Reason(s) for Recommendation			
The review combines policies and takes account of new legislation.			
Date of Initial Assessment		01 April 2026	

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1 Introduction

This policy outlines the circumstances under which tenants of Caledonia Housing Group (the Group) may assign their tenancy, apply for joint tenancy, request to create a sole tenancy from a joint tenancy, apply for a mutual exchange, sublet part or all of their home, take in a lodger or their tenancy may be succeeded. It sets out tenants' rights and responsibilities under the Housing (Scotland) Act 2001, as amended by the Housing (Scotland) Act 2014 and the Housing (Scotland) Act 2025 once enacted, and reflects our commitment to ensuring fair, transparent, and consistent decision-making.

All Scottish Secure Tenants have a legal right under the Housing (Scotland) Act 2001, and the amended provisions of the Housing (Scotland) Act 2014 to request the above tenancy related changes.

2. Principles, Aims and Objectives

We aim to ensure that all tenancy changes are managed consistently, fairly and transparently, in line with the Group's Scottish Secure Tenancy Agreement and the Housing (Scotland) Act 2001 as amended by the Housing (Scotland) Act 2014. Any new provisions introduced by the Housing (Scotland) 2025 are referenced below and will take effect when advised by the Scottish Government.

This policy will be applied in accordance with our Equality, Diversity and Inclusion Policy, Group Data Protection Policy, and Human Rights obligations.

3. Definitions

- Assignment – Where a tenant assigns their tenancy to another qualifying household member.
- Succession – Where a tenant dies and the tenancy passes to a qualifying person.
- Subletting – Where a tenant sub-lets their entire tenancy to another person for a defined period.
- Lodgers - Where a tenant asks permission to take in a lodger to rent a room within the tenancy.
- Mutual Exchange (MEX) - When two or more tenants of social landlords exchange homes with mutual consent from all landlords.
- Joint to Sole – Where one tenant requests to terminate their interest in the tenancy.
- Sole to Joint – Where a tenant with a sole tenancy applies to have a joint tenancy with another household member.

- Qualifying Period – A period where the applicant and / or the proposed tenant have been resident in the property. In all cases the qualifying period starts on the date the Group is notified of a person being resident in a property.
- Caledonia Housing Group (the Group) – Inclusive of both Caledonia Housing Association and Cordale Housing Association and any subsequent Association which joins the group.

4. Policy Statement

If a tenant wishes to make a change to their tenancy, this needs the Group's consent as the landlord. In every case this request must be in writing via the appropriate digital or paper forms. The request must be made by the tenant or their representative, or in the case of Succession, the qualifying person. In every case we will consider the request and will not unreasonably withhold permission in line with legislation. There are different eligibility requirements for each type of application and they are outlined below. The Group will provide assistance where an applicant requires it to complete the application.

4.1. Assignment

Eligibility

To approve the assignment, both the tenant and the proposed tenant must have lived at the property as their only or principal home for the 12 months before the application is received. The 12-month period begins at the point the Group has been told by the tenant that the person is living in the property as their only or principal home.

Refusal Reasons

We may refuse an assignment application if we have reasonable grounds to do so in the circumstances of the particular application. Such reasonable grounds may include, but are not limited to, the following:

- Qualifying period criteria not met.
- A Notice of Proceedings for Recovery of Possession has been served on the tenant, under any of the grounds 1-7 of Schedule 2 of the Housing (Scotland) Act 2001;
- An order for recovery of possession of the house has been granted to the Group in respect of the tenancy.
- Where it appears to the Group that a financial incentive has been offered by the Tenant in consideration of the assignment.
- The assignment would lead to overcrowding within the property.

- The Group proposes to carry out work on the house, or in the building and the proposed works will affect the accommodation.
- Where The Group would not give the proposed new Tenant (Assignee) reasonable preference under the relevant Housing Allocations Policy.
- Where the assignation would result in the home being underoccupied.
- There are outstanding rent arrears or rechargeable repairs, exceeding the value of one month's rent.
- Where the property is found to be in an unacceptable condition due to tenant damage or neglect. The tenant will, however, be given the opportunity to make good any damage at their own expense and have their application reconsidered.
- The proposed new Tenant (Assignee) has a history of anti-social behaviour or has been the subject of legal action in respect of a previous tenancy within the previous three years.
- Where the property has been designed specifically for people with a particular housing need, for example: wheelchair users. If the assignee, or a permanent member of the assignee's household, does not require accommodation of the nature described, the application for the tenancy will be refused on the grounds that the Group would not give the assignee reasonable preference under the Housing Allocations Policy. the Group has a duty to offer suitable alternative accommodation where this is available. The Assignee's household will be assessed in accordance with the criteria outlined within the Local Area Housing Allocations policy.

4.2. Succession

Eligibility

In the event of a tenant's death, the tenancy may be inherited by a qualified person as defined by the Housing (Scotland) Act 2001 as amended by Section 13 of the Housing (Scotland) Act 2014. Further amendments made by Section 49 of the Housing (Scotland) Act 2025 which will reduce the minimum period of residence of a qualifying person from 12 months to 6 months. These changes will apply where the tenant's death occurs on or after 1 August 2026.

- First Priority

The surviving spouse of the tenant if the house was their only or principal home at the time of the tenant's death OR the tenant's unmarried partner providing they had lived in the house as their only or principal home for no less than 12 months prior (qualifying period) to the death of the tenant OR the surviving joint tenant if the house was their only or principal home at the time of the tenant's death. The qualifying period will change to 6 months when the Housing (Scotland) 2025 Act comes into effect.

- Second Priority

If no one under the first priority qualifies or chooses to succeed to the tenancy, applications will be considered from a member of the deceased tenant's family or household providing that; the applicant is aged at least 16 years of age at the date of the tenant's death AND The house was the applicant's only, or principal home and they were registered with the Group for the 12 months prior to the tenant's death.

- Third Priority

If there is no one under either the first or second priority, or they choose not to succeed to the tenancy, applications will be considered from a carer so long as;

- The applicant is at least 16 years of age at the time of the tenant's death AND
- The house was their only or principal home at the time of the tenant's death and they were registered with the Group for the 12 months prior to the tenant's death AND
- The applicant had given up another only or principal home before the death of the tenant AND
- The applicant is providing, or has provided, care for the tenant or a member of the tenant's family.
- The 12-month residency period cannot begin unless we have been told that the carer is living in the property as their only or principal home. We must have been told that by the tenant, a joint tenant, or the carer.

Where no qualified successor exists, the Group will act sensitively in line with the Ending a Tenancy procedure. Where an application is refused, the applicant can appeal this decision (see section on appeals). Where the Group decides to uphold the appeal, the tenancy will be a new tenancy as opposed to a succession if the applicant does not meet the qualifying criteria.

Succession of adapted homes.

Under terms of paragraph 5 of schedule 3 of the Housing (Scotland) Act 2001, a house that has been designed or substantially adapted for the use of persons with a particular housing need, for example: wheelchair users, can only be inherited by;

- The surviving spouse providing the house was their only or principal home at the time of the tenant's death OR;
- The unmarried partner providing the house had been their only or principal home for at least 12 months (changing to 6 months) prior to the tenant's death OR;
- The surviving joint tenant if the house was their only or principal home at the time of the tenant's death OR

- A qualifying person under priority two or three that requires the adaptations made to the property, providing the house was their only or principal home for 12 months prior to the tenant's death. The qualifying period will change to 6 months when the Housing (Scotland) 2025 Act comes into effect.

A person that would have qualified under either the second or third priority but does not have the need for an adapted home, has the right to suitable alternative accommodation as defined in part 2 of schedule 2 of the Housing (Scotland) Act 2001. They will have the right to remain living in the house until the Group is able to offer suitable alternative accommodation.

Permitted Rounds of Succession

Under the Housing (Scotland) Act 2001, two rounds of succession are permitted. However, where both rounds of succession have passed, the Group will consider the housing needs of the remaining household and a decision on any application can be made by the Regional Manager.

4.3. Subletting

The legal provisions relating to subletting of tenancy requests are contained in the Housing (Scotland) Act 2001, section 32 and Schedule 5, Part 2, as amended by the Housing (Scotland) Act 2014, section 12.

A tenant can only be approved to sub-let their home if they have lived in the property for at least 12 months. If they were not the tenant for all of that time, the property must have been their only or principal home during those 12 months, and the previous tenant must have told CHG that this person was living there.

A property may be sub-let if the tenant will be temporarily absent (for example, due to work, training, study, or an extended holiday). Approval may be granted for an initial period of up to six months, with the option to extend for a further six months following review, to a maximum total of one year.

The application must state the duration, the charges and the tenancy/household details of the proposed sub-let tenancy. The amount of rent charged to the sub-tenant cannot be higher than the rent charged by the Group to the principal tenant.

However, at all times a sub-let property will remain in the name of the tenant and the person sub-letting the property cannot succeed to the tenancy.

The tenant will continue to be legally responsible for ensuring adherence to the conditions of tenancy, including payment of rent, not causing nuisance, etc. If there are any breaches of tenancy we will take legal advice and may take steps to take action against our tenant.

The tenant must also notify the Group when they return to the property.

Reasons to refuse a sublet application.

We may refuse a sub-let application if we have reasonable grounds to do so in the circumstances of the particular application. Such reasonable grounds may include, but are not limited to, the following

- A Notice of Proceedings for Recovery of Possession has been served on the tenant, under any of the grounds 1-7 of Schedule 2 of the Housing (Scotland) Act 2001;
- An order for recovery of possession of the house has been granted to the Group in respect of the tenancy.
- Where it appears to the Group that a financial incentive (a payment other than reasonable rent or deposit given as security for the subtenant's obligations for the associated tenancy costs for example, gas, electricity, telephone, home contents etc.) has been received by the Tenant in consideration of the sub-let.
- The sublet would lead to overcrowding within the property.
- The Group proposes to carry out work on the house, or in the building and the proposed works will affect the accommodation.
- Where the sublet would result in the home being underoccupied.
- There are outstanding rent arrears or rechargeable repairs, exceeding the value of one month's rent.
- The proposed sublet Tenant has a history of anti-social behaviour or has been the subject of legal action in respect of a previous tenancy within the previous three years.
- Where the property has been designed specifically for people with a particular housing need and the sub-let tenant does not require accommodation of the nature described.

Sub-Let tenants have no rights of succession, nor can the tenant assign the tenancy to a sub-let tenant.

4.4. Lodgers

Tenants may take in lodgers provided that our prior written permission has been granted.

We may refuse an application to have a lodger if we have reasonable grounds to do so in the circumstances of the particular application. Such reasonable grounds may include, but are not limited to, the following

- Overcrowding results;
- The proposed lodger has a history of anti-social behaviour or has been the subject of legal action in respect of a previous tenancy within the previous three years.

Lodgers have no rights of succession, nor can the tenant assign the tenancy to a lodger.

4.5. Joint Tenancy

We promote the right of tenants to apply to have joint tenancies with another person(s).

The legal provisions relating to joint tenancy requests are contained in the Housing (Scotland) Act 2001, section 11 and section 13. This has been amended by the Housing (Scotland) Act 2014, section 12.

The tenant must apply with the proposed joint tenant(s), in writing, to us and we can only refuse consent if it is reasonable to do so.

The proposed joint tenant must have lived in the house as their only or principal home during the 12 month qualifying period immediately before the tenant applies for a joint tenancy.

Ending of a joint tenancy

A joint tenant may also end their legal interest in the tenancy by giving four weeks written notice to us and to all other joint tenants. The tenancy does not end and the remaining tenant retains it.

4.6. Mutual Exchange

The Group will encourage mutual exchanges between tenants where both households would benefit from the exchange and be housed in appropriately sized accommodation.

Any of our tenants may request a mutual exchange with another Group tenant or with a tenant of another social landlord.

All parties must submit completed digital or paper application forms to the landlords involved. References must be received from the incoming tenant's landlord prior to approval and the Group's property must be inspected and each landlord must approve the exchange.

Applicants are required to accept the property in the condition at the time of the exchange.

Reasons for refusal

We may refuse a mutual exchange application if we have reasonable grounds to do so in the circumstances of the particular application. Such reasonable grounds may include, but are not limited to, the following

- A Notice of Proceedings for Possession has been served on the tenant on any of the “conduct grounds” set out in paragraphs 1-7 of Schedule 2 of The Housing (Scotland) Act 2001.
- An order for Recovery of Possession has been made against the tenant.
- The exchange would lead to the Group’s property becoming overcrowded.
- The exchange would lead to the Group’s property becoming under occupied and would not demonstrate best use.
- The house has been designed or adapted for occupation by a person with particular needs and, if the exchange took place, there would no longer be a person with those needs occupying the house
- Where there is substantial damage or disrepair to the property caused by the tenant, a member of the household or an invited visitor to the property.
- Where the property has been provided by the Group as part of a project or protocol with other agencies or where the property has been specifically designed for person(s) with physical disabilities and the new tenant does not need the adaptations/facilities in the property.
- Either tenant has deliberately omitted, distorted or given false information on their application.
- The house is unsuitable for the mutual exchange applicants’ needs.
- Should the applicant have any outstanding liability or debt attributable to any tenancy in the 5 years prior to their application which exceeds one month’s rent unless an agreement to repay this debt is being maintained and has been for a minimum of 3 months.
- The proposed Tenant has a history of anti-social behaviour or has been the subject of legal action in respect of a previous tenancy within the previous three years.
- Breaches of the tenancy agreement where action has been taken to remedy the situation but may not have instigated legal proceedings, such as malicious damage.

Notification of Decision

For all change of tenancy applications, the Group will notify the tenants in writing of its decision within 28 days of receiving a valid application and all required information.

If the Group has not communicated regarding the delays, or made a decision to refuse or to consent to the mutual exchange within 28 days of receiving the written application inclusive of all required information it will be deemed to have consented to the same under and in terms of Schedule 5, Part 2, Paragraph 12 of the Housing (Scotland) 2001 Act.

Appeals and Exceptional Circumstances

The Housing (Scotland) Act 2001 empowers us to refuse applications if we consider this to be reasonable. If a tenant wishes to appeal against a decision, they should do so in writing to the Group and detail the reasons for the appeal. The Regional Manager will review the appeal and provide a written response within 28 days.

The Housing (Scotland) Act 2014 advises that social landlords should account for a level of flexibility in their allocations policies in order to take account of “exceptional circumstances” which will give landlords the flexibility (within the legal constraints) to award a tenancy in such exceptional circumstances as they arise.

The Housing (Scotland) Act 2025 provides that where a landlord believes a tenant has experienced, or is experiencing, domestic abuse which explains or may have contributed to non-payment of rent, the landlord must take appropriate steps to support the tenant’s needs. Although the Act has not yet received Royal Assent, CHG will take the underlying causes of rent arrears into account when considering whether to approve or refuse a tenancy change application.

If the appeal is unsuccessful, any further complaint can be raised via the Group’s complaints handling procedure.

If the tenant is not satisfied with the outcome of the appeal, in some cases they have the right to appeal to the Sheriff Court by way of summary application within 21 days. Tenant should be advised of this and to seek independent legal advice.

5. Roles and Responsibilities

This policy shall be enacted through frontline staff. The Neighbourhood Officer will typically be the point of contact for tenants. Scheme Managers may also assist tenants within Retirement Housing. Neighbourhood Officers will be supported by Area Leaders, Regional Managers and the Head of Frontline Services where appropriate.

The Group will submit an Annual Return on the Charter (ARC) each year to the Scottish Housing Regulator (SHR) and will provide details of Mutual Exchanges and tenancy changes as required.

6. Procedures

The Group has corresponding procedures for each type of tenancy change which will detail the practical steps to be taken by frontline staff.

7. Compliance and Enforcement

We have a standard compliance statement: *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*

8. Review and Revision

This policy will be reviewed by The Regional Manager or equivalent grade, three years from the date it is approved by the Board of Management, or sooner if legislation or operational needs change.

9. Approval and Effective Date

- **9.1 Approval Details**

Approval body: Caledonia Management Board

Approval date: 13 August 2026

- **9.2 Effective Date**

This policy shall take effect from the date of approval.

Appendix 1

Equality Impact Assessment (EQIA)

Person(s) responsible for carrying out this assessment	
Policy Owner:	Regional Manager (R1)
EQIA Assessor(s):	ODBP, Business Analyst, Governance Officer
Name of Policy:	Group Tenancy Change Policy
Date of last EQIA:	N/A – new policy

Protected Characteristic: Age	
Potential/actual impact identified	Actions to remove or reduce impact
Changes of tenancy can be complicated because of the legal rules and responsibilities involved. This could make the process feel difficult or confusing for some tenants. Changes of tenancy may be required during a stressful time for a tenant, for example, in the case of a succession.	Staff can explain to a tenant their rights, and what options are available to them in terms of making a change to their tenancy. Tenancy change requests can be made in a variety of ways; in person; over the phone; in a letter; in an email; online via our website or via the Connect Portal. There are some specific forms required in some cases. The Group will provide assistance or signpost to other agencies who can help, when an applicant requires assistance to complete the application.
Overall Impact?	Positive ☒ Negative ☐ Neutral ☐

Protected Characteristic: Disability	
Potential / actual impact identified	Actions to remove or reduce impact
Changes of tenancy can be complicated because of the legal rules and responsibilities involved. This could make the process feel difficult or confusing for some tenants.	Staff can explain to a tenant their rights, and what options are available to them in terms of making a change to their tenancy. Tenancy change requests can be made in

Difficulties in communication due to a disability making applications for a change of tenancy more challenging. Changes of tenancy may be required during a stressful time for a tenant, for example, in the case of a succession or during periods of ill-health.	a variety of ways; in person; over the phone; in a letter; in an email; online via our website or via the Connect Portal. There are some specific forms required in some cases. The Group will provide advice and assistance or signpost to other agencies who can help, when an applicant requires assistance to complete the application. Making it easy to contact us in a format and at a time that suits the applicant, and offering assistance with the application, allows applicants to choose the method they are most comfortable with and ensures they are supported throughout the process. This approach could have a positive impact on disabled people by ensuring they can access information and support in a way that meets their needs. Updates on case management will be provided to people in an appropriate format, and discussions can take place to suit the tenant's needs, for example, at home, in the office, on the phone. Our websites use the accessibility software, ReachDeck, which enables website users to adjust the way in which the website is displayed and can read aloud the website text.
Overall Impact?	Positive ☒ Negative ☐ Neutral ☐

Protected Characteristic: Gender Reassignment (transgender)	
Potential / actual impact identified	Actions to remove or reduce impact
Changes of tenancy can be complicated because of the legal rules and responsibilities involved. This could make the process feel difficult or	Tenancy change requests can be made in a variety of ways; in person; over the phone; in a letter; in an email; online via our website or via the Connect Portal.

stressful for some tenants. Changes of tenancy may be required during a stressful time for a tenant, for example, during a period of transition, which might include medical treatment.	There are some specific forms required in some cases. The Group will provide advice and assistance or signpost to other agencies who can help, when an applicant requires assistance to complete the application Making it easy to contact us in a format and at a time that suits the applicant, and offering assistance with the application, allows applicants to choose the method they are most comfortable with and ensures they are supported throughout the process. This approach could have a positive impact on someone undergoing gender reassignment.
Overall Impact?	Positive ☒ Negative ☐ Neutral ☐

Protected Characteristic: Marriage and civil partnership	
Potential/actual impact identified	Actions to remove or reduce impact
Changes of tenancy can be complicated because of the legal rules and responsibilities involved.	Tenancy change requests can be made in a variety of ways; in person; over the phone; in a letter; in an email; online via our website or via the Connect Portal. There are some specific forms required in some cases. The Group will provide advice and assistance or signpost to other agencies who can help, when an applicant requires assistance to complete the application. Making it easy to contact us in a format and at a time that suits the applicant, and offering assistance with the application, allows applicants to choose the method they are most comfortable with and ensures they are supported throughout the process.
Overall Impact?	Positive ☐ Negative ☐ Neutral ☒

Protected Characteristic: Pregnancy and maternity	
Potential / actual impact identified	Actions to remove or reduce impact
Changes of tenancy can be complicated because of the legal rules and responsibilities involved. This could make the process feel difficult or stressful for tenants who are pregnant or new mothers. Changes of tenancy may be required during a stressful time, for example, during pregnancy or the period following childbirth.	Tenancy change requests can be made in a variety of ways; in person; over the phone; in a letter; in an email; online via our website or via the Connect Portal. There are some specific forms required in some cases. The Group will provide advice and assistance or signpost to other agencies who can help, when an applicant requires assistance to complete the application. Making it easy to contact us in a format and at a time that suits the applicant, and offering assistance with the application, allows applicants to choose the method they are most comfortable with and ensures they are supported throughout the process.
Overall Impact?	Positive ☒ Negative ☐ Neutral ☐

Protected Characteristic: Race (including, ethnicity, nationality and Gypsy, Roma and Traveller communities)	
Potential / actual impact identified	Actions to remove or reduce impact
Changes of tenancy can be complicated because of the legal rules and responsibilities involved. This could make the process feel difficult or inaccessible for tenants where English is not their first language.	The Group is a member of Happy to Translate and displays the logo on its websites. Staff can explain to a tenant their rights, and what options are available to them in terms of making a change to their tenancy. Our websites also use ReachDeck which enables website users to translate the website text into a range of other

	languages, which the software can then read aloud in that language.
Overall Impact?	Positive ☒ Negative ☐ Neutral ☐

Protected Characteristic: Religion or belief (consider dates/times of events in relation to religious practices/festivals)

Potential / actual impact identified	Actions to remove or reduce impact
Changes of tenancy can be complicated because of the legal rules and responsibilities involved. This could make the process feel difficult or inaccessible for tenants if they felt their religious beliefs are not taken into consideration.	Staff can explain to a tenant their rights, and what options are available to them in terms of making a change to their tenancy. Tenancy change requests can be made in a variety of ways; in person; over the phone; in a letter; in an email; online via our website or via the Connect Portal. There are some specific forms required in some cases. The Group will provide advice and assistance or signpost to other agencies who can help, when an applicant requires assistance to complete the application. Making it easy to contact us in a format and at a time that suits the applicant, and offering assistance with the application, allows applicants to choose the method they are most comfortable with and ensures they are supported throughout the process. We will take account of someone's religion or belief where this may affect how we engage with them. For example, where a person has religious or cultural preferences regarding meetings, appointments or home visits, we will seek to accommodate these wherever reasonably practicable.

Overall Impact?	Positive ☒ Negative ☐ Neutral ☐
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Protected Characteristic: Sex / Gender	
Potential/actual impact identified	Actions to remove or reduce impact
Changes of tenancy can be complicated because of the legal rules and responsibilities involved. This could make the process feel difficult or inaccessible for tenants if the arrangements to seek advice or assistance about an application were not flexible, or did not fit around their caregiving or work commitments.	Tenancy change requests can be made in a variety of ways; in person; over the phone; in a letter; in an email; online via our website or via the Connect Portal. There are some specific forms required in some cases. The Group will provide advice and assistance or signpost to other agencies who can help, when an applicant requires assistance to complete the application Making it easy to contact us in a format and at a time that suits the applicant, and offering assistance with the application, allows applicants to choose the method they are most comfortable with and ensures they are supported throughout the process. This approach could have a positive impact on someone with work or caregiving commitments.
Overall Impact?	Positive ☒ Negative ☐ Neutral ☐

Protected Characteristic: Sexual orientation (LGBTQ+)	
Potential / actual impact identified	Actions to remove or reduce impact
Changes of tenancy can be complicated because of the legal rules and responsibilities involved. This could make the process feel difficult or inaccessible for tenants if the arrangements to seek advice or	Tenancy change requests can be made in a variety of ways; in person; over the phone; in a letter; in an email; online via our website or via the Connect Portal. There are some specific forms required in some cases. The Group will provide assistance or signpost to other agencies

assistance about an application were not flexible or accessible.	who can help, when an applicant requires advice and assistance to complete the application Making it easy to contact us in a format and at a time that suits the applicant, and offering assistance with the application, allows applicants to choose the method they are most comfortable with and ensures they are supported throughout the process.
Overall Impact?	Positive ☒ Negative ☐ Neutral ☐

Beyond the 9 Protected Characteristics	
Socioeconomic status	Homelessness Unpaid caring responsibilities
Potential / actual impact identified	Actions to remove or reduce impact
People living in tenanted properties may be uncertain about their rights and the protections available to them during a tenancy change. This might include; unpaid carers, survivors of domestic abuse, care-experienced people and those who have previously experienced or are at a risk of homelessness.	Support is available through contacting us to explain and discuss individual circumstances. Staff are trained in tenancy management and can provide advice or signpost on to other agencies who can offer support. Exceptional circumstances will always be considered to ensure we meet our obligations as a responsible social landlord that takes a human-rights based approach.
Overall Impact?	Positive ☒ Negative ☐ Neutral ☐

Further Recommendations?

(Consultation, issues, questions, changes to policy made in light of the assessment and any follow-up actions, including action lead and timescales)

No further recommendations identified. The assessment concludes that the policy is likely to have a positive impact by providing flexible and accessible methods of engagement and support throughout the tenancy change process.

Overall Impact Rating

Material impact



Non-material impact



If the assessment identifies negative impacts that are material, an extended equality impact assessment will be carried out.

Extended impact assessment carried out

Not applicable