

Loreburn Group

# Tenancy Sustainment Policy



**Creating Great Places to Live**

|                                  |   |   |              |     |             |           |                       |                    |
|----------------------------------|---|---|--------------|-----|-------------|-----------|-----------------------|--------------------|
| <b>Policy</b>                    | Tenancy Sustainment Policy  |   |              |     |             |           |                       |                    |
| <b>Version Reference</b>         | 2   |   |              |     |             |           |                       |                    |
| <b>Approved by</b>               | MC  |   |              | LET |             |           | MT                    | X                  |
| <b>Date of Approval</b>          | February 2021   |   |              |     |             |           |                       |                    |
| <b>Review Period</b>             | Every 3 Years <b>or</b> as legislation or substantive changes occur |   |              |     |             |           |                       |                    |
| <b>Review Due</b>                | February 2024   |   |              |     |             |           |                       |                    |
| <b>Policy Champion</b>           | Head of Housing Services  |   |              |     |             |           |                       |                    |
| <b>Who this policy affects</b>   | Staff   | x | Customers    | x   | Contractors |           | Members of the Public |                    |
| <b>Where this policy affects</b> | General needs   | x | Later Living |     | x           | Supported |                       | Offices/staff base |

## 1 Purpose of this Policy

- 1.1 Loreburn Housing Association is committed to providing an effective housing service to all customers and recognises the role it plays in minimising tenancy breakdown, preventing homelessness and promoting stable and sustainable communities throughout Dumfries and Galloway.
- 1.2 The Tenancy Sustainment Policy sets out Loreburn Housing Association's approach to supporting customers to successfully manage and sustain their tenancies and to put in place frameworks that help identify vulnerable households, support customers experiencing difficulties and assist them to access a wide range of local and national services that can provide support or advice.
- 1.3 The Association is committed to making a positive impact on the lives of its customers by addressing issues such as fuel poverty, financial exclusion and domestic abuse by building strong, stable communities and strengthening our relationships with community partners and third sector organisations across the region. The Tenancy Sustainment Policy therefore intends to draw on a range of expertise to compliment the Association's activities and to provide a proactive, focused, co-ordinated and joined up approach to tenancy sustainment.
- 1.4 We consider that a tenancy has not been sustained if it ends within 12 months of its commencement and we use the definition set out by the Scottish Housing Regulator in the Scottish Social Housing Charter (*Percentage of new tenancies sustained for more than a year*) to assess our effectiveness and performance in this area.
- 1.5 We will participate in the HouseMark tenancy sustainability club which brings together in and out of sector experts and provides an opportunity to share approaches and discuss challenges relating to tenancy sustainment. Through this learning we will evidence our growth mindset and willingness to adapt our practices.
- 1.6 We are particularly concerned to prevent tenancies ending in:
  - Eviction – at any time
  - Abandonment – at any time
  - Early termination (a tenancy which last under 12 months)
- 1.7 We recognise that people may terminate their tenancy for more positive reasons such as purchasing a home, moving to take up a new job or moving in with a partner.
- 1.8 The Association understands the importance of good partnership working and that by liaising with relevant external agencies on behalf of the customer, and sharing appropriate information with them, the Association can help customers access support in times of difficulty and ultimately assist them to combat any issues affecting their ability to sustain their tenancy.

- 1.9 To this end, Association staff will familiarise themselves with the services of support agencies operating throughout Dumfries and Galloway and agree referral arrangements, or where necessary, protocols for liaising and working with these agencies and organisations. This may also include training for Association staff in order to familiarise themselves with the service and support these agencies can/will provide to customers of the Association.

## 2 Legislative Background

- 2.1 Loreburn Housing Association will comply with all relevant legislation and associated regulations, including:

- The Housing (Scotland) Act 1987, 2001, 2010 & 2014
- The Homelessness etc. (Scotland) Act 2003
- The Welfare Reform Act 2012
- Equalities Act 2010
- Mental Health (Care and Treatment) (Scotland) Act 2003
- Antisocial Behaviour etc (Scotland) Act 2004
- Rehabilitation of Offenders Act 1974; and
- The Scottish Social Housing Charter

- 2.2 This Policy seeks to achieve the following regulatory requirement contained in the Scottish Social Housing Charter:

- **Outcome 1: Equalities** – Customers and other customers have their individual needs recognised, are treated fairly and with respect, and receive fair access to housing and housing providers.
- **Outcomes 7, 8 & 9: Housing options** – people looking for housing get information that helps them make informed choices and decisions about the range of housing options available to them, Customers and people on housing lists can review their housing options, and people at risk of losing their homes get advice on preventing homelessness.
- **Outcome 10: Access to social housing** – people looking for housing find it easy to apply for the widest choice of social housing available and get the information they need on how the landlord allocates homes and their prospects of being housed.
- **Outcome 11: Tenancy sustainment** – Customers get the information they need on how to obtain support to remain in their home and ensure suitable support is available, including services provided directly by the landlord and by other organisations.
- **Outcome 13: Value for money** – Customers, owners and other customers receive services that provide continually improving value for the rent and other charges they pay.

### 3 Associated Policies

3.1 This document should be read in conjunction with:

- Loreburn Housing Association's Scottish Secure Tenancy Agreement (SST)
- Void Property Management Policy
- Choice Based Lettings Policy
- Income Maximisation Policy
- Tenancy Changes Policy
- Estate Management Policy
- Domestic Abuse Policy
- Anti-Social Behaviour Policy

### 4 Aims & Outcomes

4.1 The Tenancy Sustainment Policy aims to ensure that Loreburn Housing Association provides an effective housing service that complies with its social landlord obligations in respect of tenancy sustainment. Specifically, the aims of this Policy are to:

- Identify and respond to customers' individual needs through providing a personalised and tailored housing management service.
- Support initiatives which seek to improve tenancy sustainment.
- Enhance joint working practices with Dumfries and Galloway Council's Housing Options and Homeless Service, community partners and Third Sector Organisations.
- Monitor, evaluate and work to continuously improve tenancy sustainment rates and the Association's performance in this area in line with Strategic Performance Indicators.
- Maximise tenancy sustainment to minimise property turnover and void loss

4.2 Our approach to Tenancy Sustainment will be as follows.

4.3 **Identification of vulnerable customers** – ensuring that at the pre-tenancy stage of all tenancies, steps are taken to understand and identify any customers who may require support to sustain a tenancy. A 'Getting to Know You' assessment [**Appendix 1**] will be undertaken to inform a personal housing support plan. This will enable a prospective customer to highlight any support needs they may have and will assist the Association in supporting them to sustain their tenancy. This will identify household needs including:

- Communication needs e.g. deaf, dyslexia, English as a second language
- Disability and support needs e.g. present care or support packages

- What support is required in managing the tenancy e.g. support required in settling into their new property, assistance with budgeting and ongoing support.
  - Employability support and/or interest in volunteering
- 4.4 This assessment intends to identify with the customer what their individual or household needs are.
- 4.5 **Tenancy Support** – ensuring that all customers are supported throughout their tenancy, individual support needs are identified and where appropriate, referrals are made on behalf of the customer to partner agencies who can assist with that support. During a tenancy a customer’s needs may increase and the type of input they require to sustain their tenancy may change.
- 4.6 If support needs are identified a personal housing support plan will be produced **[Appendix 2]**. This will identify what support actions will be taken or what advice is offered. It will highlight what support the Association can provide directly as well as sign-posting and referring the customer to other sources of support or advice provided by other agencies.
- 4.7 To support this the “Getting to Know You” assessment can be completed or reviewed at any time. This can be triggered in the following ways:
- a) Neighbourhood Officer approaches the customer to offer an assessment. This can be triggered by such things as:
    - Concerns about the customers living conditions or lifestyle which is affecting the management of their tenancy
    - A customer finding it difficult to understand or adhere to a tenancy condition
    - Significant change in a customer’s circumstances e.g. deterioration in health such as dementia, disability or illness.
  - b) The customer requests that we undertake an assessment to produce a personal housing support plan
- 4.8 Where it is appropriate, referrals will be made direct to Social Work in relation to child protection and vulnerable adult situations following the relevant policies and procedures.
- 4.9 The “Getting to Know You” assessment is part of the generic housing support services provided by the Association. It is not a registered housing support service.
- 4.10 **Partnership working** – demonstrating effective partnership working and fostering good working relationships with agencies that can work with us to assist our customers in sustaining their tenancy. Clearly identifying what services, the Association can provide and sign posting the customer to other appropriate agencies
- 4.11 The overall objectives of the Policy are to minimise the number of tenancy failures and prevent homelessness by ensuring that customers who want to

remain living in their home are provided with all the support they require to continue doing so and as such sustain their tenancy.

4.12 Specifically, the objectives relating to this Policy are to:

- identify groups most at risk of tenancy failure and provide tailored support to these customers and households
- work proactively to address the factors and triggers that put customers at risk of tenancy failure
- improve our understanding of the causes of tenancy failure within our stock profile
- develop and support initiatives aimed at increasing the level of tenancy sustainment, based on an understanding of the reasons for tenancy failure
- ensure that the Association has effective mechanisms for early identification of tenancies that are at risk
- work collaboratively with a range of community partners and services that, through a referral process, can help customers combat any issues that may impact on their tenancy sustainment
- develop strong and effective partnerships and relationships that ensure that these services can be easily accessed by Loreburn Housing Association customers
- ensure staff have the right skills and resources that allow them to engage effectively with customers
- provide assistance to new customers with moving in and making the house a home where they feel comfortable, safe and secure
- ensure tenancy sustainment data is collected consistently and reported regularly via the agreed performance monitoring framework
- develop benchmarking opportunities aimed at improving performance
- reduce the incidences of Loreburn Housing Association customers becoming homeless; and
- listen to and act on the views of Loreburn Housing Association customers and customers.

## 5. Tenancy Sustainment in Practice

- 5.1 Loreburn Housing Association is committed to making a lasting difference to the day-to-day lives of our customers by supporting them to live independently, sustain their tenancy and prevent them becoming socially excluded. The purpose of identifying potential vulnerability is to ensure that the service provided is, wherever possible, tailored to meet the needs of the individual. People will have different needs at different times and each customer's experiences will be different, requiring a range of flexible responses.

|                           |   |  |
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| <p><b>Pre-tenancy</b></p> | <p>We will let our properties in a way that gives reasonable preference to those in greatest housing need, makes best use of available housing stock, maximises choice and helps sustain communities.</p> <p>We advertise our available properties through a Choice Based Lettings system and promote housing options for applicants by working collaboratively with Dumfries and Galloway Council, other social landlords and through participation in nomination agreements with social services for supported lets.</p> <p>In an effort to minimise tenancy failures, we will seek to develop pre-tenancy, during tenancy and post-tenancy measures to assist in identifying customers at most risk of abandoning their tenancies, ending their tenancies prematurely, or developing tenancy related issues.</p> | <ul style="list-style-type: none"><li>▪ At the point of allocation the neighbourhood officer responsible for the management of the tenancy will review the new customers details and use the criteria in the table at Section 6 to identify potential vulnerabilities which research has shown can be barriers to tenancy sustainment.</li></ul> <p>A 'Getting to Know You" assessment will be undertaken with all new customers at offer stage and where appropriate a personal housing support plan will be drawn up.</p> <ul style="list-style-type: none"><li>▪ Appropriate discussions will be held with the customer where all possible options and resources available and designed to support them in managing and sustaining their tenancy will be discussed. This will include engagement with external agencies such as ILS regarding support needs/packages where necessary.</li><li>▪ At the commencement of a tenancy we will provide information on tenancy sustainment and work to</li></ul> |
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|   |  | <p>address any issues or concerns a new customer may have such as furnishing the property and making it a home.</p> <ul style="list-style-type: none"> <li>▪ Carry out accompanied viewing of properties offering advice to proposed new customers on the lettable standard; decoration allowance; affordability, public utilities and fixtures and fittings within their new home.</li> <li>▪ Promotion of the GREAT Start initiative designed to provide assistance and address concerns regarding furniture poverty for new customers with limited income to access furniture and equipment for their home.</li> <li>▪ A 'New Customer Visit' will be carried out within 4-6 weeks of the date of entry to review any changes or support needs. This will be reduced to 2-3 weeks for any new customers identified through the pre-allocation checks as being in the 'higher risk' category. The reduced timeframe will also identify more timeously where customers are yet to move into the property.</li> </ul> |
| <p><b>During Tenancy</b><br/>- Roles and Responsibilities</p> | <p>Whilst every customer is responsible for managing their tenancy and complying with their tenancy agreement the Association recognises that it has an important role to play in identifying customers and/or households with particular needs or who may otherwise be vulnerable and provide the necessary</p> | <ul style="list-style-type: none"> <li>▪ The Neighbourhood Officer will maintain regular, personal and sustained contact with "higher risk" customers and households' through the delivery of a service personalised to their needs.</li> <li>▪ We will ensure the customer is aware of their responsibilities and is aware of who their</li> </ul>   |

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|                            | <p>support including referrals to relevant external agencies for advice and assistance.</p> <p>We will work with our customers to identify any such needs referrals will be made with consent where a customer or household has particular needs or may otherwise be considered vulnerable and where this is likely to increase the successful sustainment of the tenancy.</p> | <p>Neighbourhood Officer and/or Income Officer is and has their direct contact details.</p> <ul style="list-style-type: none"> <li>▪ We will work in partnership, build and nurture relationships with specialist support agencies who work with vulnerable client groups along with statutory authorities across the region to ensure Loreburn HA customers are able to access the right support at the right times.</li> <li>▪ Neighbourhood Officers will make referrals to appropriate services so that customers can access advice and build support networks regarding a range of issues such as, Social Security entitlement, household budgeting, and initiate early intervention in the case of financial crisis or poverty. This will ensure customers have their needs met in a holistic way personalised to their particular circumstances.</li> <li>▪ Identify changes in support needs required to sustain a tenancy – for example, disabled aids and adaptations</li> <li>▪ Ensuring all customers and service users are able to understand and access services provided by the Association and those of partner agencies who can offer support and advice.</li> </ul> |
| <p><b>Post Tenancy</b></p> | <p>Loreburn HA consider that a failed tenancy is one that ends by eviction, abandonment or where a tenancy is</p>  | <ul style="list-style-type: none"> <li>▪ Every tenancy termination notification will result in the Neighbourhood Officer contacting the customer within 1 working day to establish the</li> </ul>   |

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|  | <p>ended early (i.e. a tenancy which lasts less than 12 months) or is ended for a negative reason.</p> <p>A tenancy which falls into this category can incur substantial additional costs for the Association including rent loss (through void period and possible former customer arrears); cost of re-let repairs (including possible rechargeable repairs); resources associated with the lettings procedure and in some cases legal costs.</p> <p>A failed tenancy can also have a long term impact on customers if they leave for negative reasons e.g. debt if they cannot afford the rent which may impact on their ability to secure other accommodation.</p> | <p>reasons for termination. Where the tenancy is ending for a negative reason it will be established what the Association can do to support the tenancy, for example help to address fuel costs through heating upgrades, maximising household income through benefit entitlement checks and supporting resolutions to neighbour disputes.</p> <ul style="list-style-type: none"> <li>▪ We will analyse information from exit interviews and termination forms with the view to continuously improve our services and to review procedures as and when required.</li> </ul> |
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## 6. Identifying Vulnerable Customers

6.1 We use this table of criteria as it provides a consistent approach for recognising and identifying potentially vulnerable residents. An indicator of **potential** vulnerability does not mean a customer needs an enhanced service, it is an alert to use professional judgement and to work proactively rather than reactively to support tenancy sustainment.

| <b>Identifying Vulnerable Customers: Status + One criterion in at least one of the two remaining categories</b>    |   |   |
|--|---|---|
| <b>Status</b>  | <b>Functional Ability</b>   | <b>Support Networks</b>   |
| Mental Health Needs<br>Learning Difficulties<br>Severe Physical Health Problems<br>Disability<br>Customer under 18 | Self-neglect<br>Unable to perform self-care tasks<br>Difficulty with significant daily tasks<br>Significant problems with finances or budgeting | Lives alone<br>Parent/Carer unable to provide support with presenting problem<br>Involvement with Social Services<br>No or inadequate support network |

|   |   |  |
|---|---|--|
| <p> Leaving care (under 25)<br/> First Year of Tenancy<br/> Affected by ASB<br/> Experience of Domestic Abuse<br/> Affected by Harassment or Hate Crime<br/> Low Income<br/> Alcohol or Substance Misuse<br/> History of Street Homelessness<br/> Refugee or Asylum Seeker<br/> Ex-offender (unspent offence)<br/> Ex-services or Veteran<br/> Young Lone Parent under 25<br/> Child aged 5 or under in household<br/> Pregnancy<br/> Person of Pensionable Age<br/> Recently Bereaved (12 months)<br/> Hoarding Disorder or History of Hoarding </p> | <p> No previous experience managing independent housing<br/> Chaotic lifestyle<br/> Severely impaired mobility<br/> Language or literacy difficulties<br/> Deaf<br/> Visually impaired<br/> Physical frailty<br/> Hoarding<br/> Overcrowded/under occupied </p> |  |
|---|---|--|

## **7. Performance Monitoring**

7.1 We measure and report regularly to Loreburn's Executive Team (LET) and Management Committee on the following, along with benchmarking against previous year's performance and against that of our RSL peer group.

- Evictions – monitor the number of decrees granted and the number of evictions implemented
- Abandoned tenancies – monitor the number of tenancies abandoned;
- Levels of tenancy sustainment (number of new customers still in their tenancy after one year) and the reasons for termination.

7.2 We consider that a tenancy has not been sustained if it ends within 12 months of its commencement. We monitor performance in this area in two ways.

- i) Using the definition set out by the Scottish Housing Regulator in the Scottish Social Housing Charter - this indicator looks at tenancies which commenced in the previous reporting year and ended within 12 months by source of let.
- ii) Examining all tenancies ending in the reporting month regardless of the commencement date that ended within 12 months by source of let.

## **8. Complaints**

8.1 Loreburn has a commitment to valuing complaints and ensures the organisation benefits from feedback to identify areas for change or improvement.

8.2 Loreburn has a Complaints Policy which ensures there are robust and effective procedures in place for complaints to be properly managed and acted upon.

8.3 Anyone dissatisfied with the outcome of their complaint having exhausted Loreburn's complaints procedure has the right to refer the matter to the Scottish Public Services Ombudsman.

## **9. Equality & Human Rights**

9.1 Loreburn aims to ensure that equality, fairness, dignity and respect are central to the way we work and how we treat our customers. We support diversity and uphold equal opportunities in all areas of our work as an employer and service provider.

9.2 Loreburn will not discriminate against customers, staff, visitors, suppliers or others based on their age, sex, sexual orientation, race, disability, religion or belief, marital status, pregnancy and maternity or gender reassignment (collectively referred to as 'protected characteristics' in the Equality Act 2010).

## **10. Risk Management**

- 10.1 Loreburn has a Risk Management Policy, Policy and Procedure. These documents set out how the organisation will manage risk as an integral part of its governance and management systems, ensuring risks are identified, evaluated and controlled effectively.
- 10.2 Identifiable risks arising from this policy will be monitored and managed by the internal processes set out herein and by regular review of this and all other associated policies and procedures, ensuring risks are mitigated and Loreburn complies with all legislative requirements and regulatory and best practice guidance.

**Appendix 1**

**Agreeing Personal Housing Support Plans Getting to Know You**

New customer  or Existing Customer

|   |              |               |             |  |
|---|--------------|---------------|-------------|--|
| <b>Date of Completion</b>                       |              |               |             |  |
| <b>Customer Start Date</b>                      |              |               |             |  |
| <b>Address of Property/ Property on Offer</b>   |              |               |             |  |
| Landline phone numbers                          |              |               |             |  |
| e-mail addresses                                |              |               |             |  |
| <b>Customer's name</b>                          |              |               |             |  |
| Date of birth                                   |              |               |             |  |
| National insurance number                       |              |               |             |  |
| Mobile phone number                             |              |               |             |  |
| <b>Joint customer's name &amp; relationship</b> |              |               |             |  |
| Date of birth                                   |              |               |             |  |
| National insurance number                       |              |               |             |  |
| Mobile phone number                             |              |               |             |  |
| <b>Confirm those living with customer</b>       |              |               |             |  |
| Name  | Relationship | Date of birth | Nat ins no. |  |
|   |              |               |             |  |
|   |              |               |             |  |
|   |              |               |             |  |
|   |              |               |             |  |

**Do you consider yourself or a member of your household to have a disability or a vulnerability?**

|      |  |         |  |
|------|--|---------|--|
| Name |  | Details |  |
| Name |  | Details |  |
| Name |  | Details |  |

**Confirm if any in household have a medical condition or support requirements**

|   |  |           |                          |    |                          |     |                          |     |                          |     |                          |    |                          |     |                          |    |                          |     |                          |      |                          |               |                          |           |                          |
|---|--|-----------|--------------------------|----|--------------------------|-----|--------------------------|-----|--------------------------|-----|--------------------------|----|--------------------------|-----|--------------------------|----|--------------------------|-----|--------------------------|------|--------------------------|---------------|--------------------------|-----------|--------------------------|
| Name  | Medical condition/support requirement/care package requirement   |           |                          |    |                          |     |                          |     |                          |     |                          |    |                          |     |                          |    |                          |     |                          |      |                          |               |                          |           |                          |
|   |  |           |                          |    |                          |     |                          |     |                          |     |                          |    |                          |     |                          |    |                          |     |                          |      |                          |               |                          |           |                          |
| Do you expect your housing needs to change in the future and the property become unsuitable (for example, medical or health needs)  |  |           |                          |    |                          |     |                          |     |                          |     |                          |    |                          |     |                          |    |                          |     |                          |      |                          |               |                          |           |                          |
| Does anyone already receive support/care, if yes who is the provider? (name, contact details and times)   |  |           |                          |    |                          |     |                          |     |                          |     |                          |    |                          |     |                          |    |                          |     |                          |      |                          |               |                          |           |                          |
| <p>Is the household in receipt of benefits? <b>Household may not wish to answer, but will help with maximising income/benefit check</b></p> <p>Does customer wish for a benefit entitlement check to be carried out Yes/No</p> <p>(If yes, advise Income Officer)</p> | <p>Yes/No</p> <table border="1"> <tr> <td>JSA</td> <td><input type="checkbox"/></td> <td>UC</td> <td><input type="checkbox"/></td> </tr> <tr> <td>ESA</td> <td><input type="checkbox"/></td> <td>PIP</td> <td><input type="checkbox"/></td> </tr> <tr> <td>DLA</td> <td><input type="checkbox"/></td> <td>IS</td> <td><input type="checkbox"/></td> </tr> <tr> <td>WTC</td> <td><input type="checkbox"/></td> <td>IB</td> <td><input type="checkbox"/></td> </tr> <tr> <td>CTC</td> <td><input type="checkbox"/></td> <td>IIDB</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Child Benefit</td> <td><input type="checkbox"/></td> <td>Incap Ben</td> <td><input type="checkbox"/></td> </tr> </table> <p>Other _____</p> | JSA       | <input type="checkbox"/> | UC | <input type="checkbox"/> | ESA | <input type="checkbox"/> | PIP | <input type="checkbox"/> | DLA | <input type="checkbox"/> | IS | <input type="checkbox"/> | WTC | <input type="checkbox"/> | IB | <input type="checkbox"/> | CTC | <input type="checkbox"/> | IIDB | <input type="checkbox"/> | Child Benefit | <input type="checkbox"/> | Incap Ben | <input type="checkbox"/> |
| JSA   | <input type="checkbox"/>   | UC        | <input type="checkbox"/> |    |                          |     |                          |     |                          |     |                          |    |                          |     |                          |    |                          |     |                          |      |                          |               |                          |           |                          |
| ESA   | <input type="checkbox"/>   | PIP       | <input type="checkbox"/> |    |                          |     |                          |     |                          |     |                          |    |                          |     |                          |    |                          |     |                          |      |                          |               |                          |           |                          |
| DLA   | <input type="checkbox"/>   | IS        | <input type="checkbox"/> |    |                          |     |                          |     |                          |     |                          |    |                          |     |                          |    |                          |     |                          |      |                          |               |                          |           |                          |
| WTC   | <input type="checkbox"/>   | IB        | <input type="checkbox"/> |    |                          |     |                          |     |                          |     |                          |    |                          |     |                          |    |                          |     |                          |      |                          |               |                          |           |                          |
| CTC   | <input type="checkbox"/>   | IIDB      | <input type="checkbox"/> |    |                          |     |                          |     |                          |     |                          |    |                          |     |                          |    |                          |     |                          |      |                          |               |                          |           |                          |
| Child Benefit   | <input type="checkbox"/>   | Incap Ben | <input type="checkbox"/> |    |                          |     |                          |     |                          |     |                          |    |                          |     |                          |    |                          |     |                          |      |                          |               |                          |           |                          |
| Has there been a significant change in circumstances and if so, is a benefits check required?   | Yes/No   |           |                          |    |                          |     |                          |     |                          |     |                          |    |                          |     |                          |    |                          |     |                          |      |                          |               |                          |           |                          |
| Do you or any member of your household have issues with   | Yes/No   |           |                          |    |                          |     |                          |     |                          |     |                          |    |                          |     |                          |    |                          |     |                          |      |                          |               |                          |           |                          |

|  |   |
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| <p>drugs and/or alcohol or need support with the disposal of needle?</p>   | <p>Details:</p>                           |
| <p><b>Support in Managing your Tenancy</b></p>   |   |
| <p><b>Is there any support you will need to settle into your new tenancy? Yes/No</b></p> <p>Advice and assistance needed in settling into your new tenancy.</p>  | <p><b>Action Agreed/ Advice Given</b></p> |
| <p><b>Is there any support you will need to maintain regular rent payments? Yes/No</b></p> <p>Advice/assistance with setting up rent payments, budgeting, applying for benefits, arrears management etc.</p> | <p><b>Action Agreed/ Advice Given</b></p> |
| <p><b>Is there any support you may need in managing your tenancy? Yes/No</b></p>   | <p><b>Action Agreed/ Advice Given</b></p> |
| <p><b>Emergency contact details, details of person/solicitor/POA to be contacted in an emergency situation if the customer cannot be reached.</b></p>  |   |
| <p>Next of kin/emergency contact</p>   |   |

|   |                                      |
|---|--------------------------------------|
|   |                                      |
| Address   |                                      |
| Telephone number  |                                      |
| Relationship to customer  |                                      |
| Do you have any communication needs? (hearing/visual impairment, dyslexic)  | Yes/No/Prefer not to say<br>Details: |
| <b>Contact Preference</b>   |                                      |
| Standard Print  |                                      |
| Large Print   |                                      |
| Audio Tape  |                                      |
| Audio CD  |                                      |
| Email   |                                      |
| Braille   |                                      |
| Do you need support accessing our information in another language?  | Yes/No (Specify)                     |
| Are there any other support issues or information you would like to discuss with us?<br>Yes/No/ Prefer not to Say |                                      |
| Are there any pets?   |                                      |
| <b>General information</b>  |                                      |
| Is the customer or member of household interested in becoming   | <input type="checkbox"/>             |

|   |  |
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| involved with the Tenant Scrutiny Group                             |  |
| Discuss interest in customer participation:                         | <input type="checkbox"/>                                   |
| <input type="checkbox"/> Completing Customer Satisfaction Forms     | <input type="checkbox"/> Completing Questionnaires/Surveys |
| <input type="checkbox"/> Taking Part in Telephone Surveys           | <input type="checkbox"/> Attending Consultation Events     |
| <input type="checkbox"/> Become a shareholding member               |  |
| <input type="checkbox"/> Joining a Registered Customers Group (RTO) | <input type="checkbox"/> Join an Informal Customers Group  |

### Permission to Liaise & Share Information

#### Data Protection

I/we understand in referring to other agencies or in helping to support me/us in our tenancy, Loreburn Housing Association may seek or provide information to the other agencies and I/we consent to this.

This information held by the Association will only be used for the purposes of providing support to a Loreburn HA tenancy and will be held securely. The only exception to this is where there is deemed to be a child protection or vulnerable adult situation, where the information will be released in line with the Child Protection and Vulnerable Adults Policy.

|   |
|---|
| Customer's name .....<br><br>Customer's signature .....             |
| Joint customer's name .....<br><br>Joint customer's signature ..... |
| Member of staff name .....<br><br>Signature .....                   |

Loreburn Housing Association is committed to promoting equal opportunities and diversity in communities. We assist people in housing need regardless of sex or marital status, race, disability, age, sexual orientation, language, nationality or social origin, religious or political beliefs.

To ensure we do not discriminate directly or indirectly and to help us provide services that best meet the needs of our customers we need to keep accurate records.

Please help us by completing this form. This information is for monitoring purposes only. You do not have to provide the information if you do not want to.

| <b>Ethnic Origin</b>      | <b>Customer</b>          | <b>Joint Customer</b>    |
|---------------------------|--------------------------|--------------------------|
| White Scottish            | <input type="checkbox"/> | <input type="checkbox"/> |
| White British             | <input type="checkbox"/> | <input type="checkbox"/> |
| White Irish               | <input type="checkbox"/> | <input type="checkbox"/> |
| Other White background    | <input type="checkbox"/> | <input type="checkbox"/> |
| Any mixed race background | <input type="checkbox"/> | <input type="checkbox"/> |
| Indian                    | <input type="checkbox"/> | <input type="checkbox"/> |
| Pakistani                 | <input type="checkbox"/> | <input type="checkbox"/> |
| Bangladeshi               | <input type="checkbox"/> | <input type="checkbox"/> |
| Chinese                   | <input type="checkbox"/> | <input type="checkbox"/> |
| Other Asian background    | <input type="checkbox"/> | <input type="checkbox"/> |
| Caribbean                 | <input type="checkbox"/> | <input type="checkbox"/> |
| African                   | <input type="checkbox"/> | <input type="checkbox"/> |
| Other Black background    | <input type="checkbox"/> | <input type="checkbox"/> |
| Gypsy/Traveller           | <input type="checkbox"/> | <input type="checkbox"/> |
| Other ethnic background   | <input type="checkbox"/> | <input type="checkbox"/> |
| Other background          | <input type="checkbox"/> | <input type="checkbox"/> |
| Chose not to answer       | <input type="checkbox"/> | <input type="checkbox"/> |

**Appendix 2**

**Tenancy Sustainment Support Plan**

| <b>Goals</b> | <b>Action Points</b> | <b>Who</b> | <b>By Date</b> |
|--------------|----------------------|------------|----------------|
|              |                      |            |                |
|              |                      |            |                |
|              |                      |            |                |
|              |                      |            |                |
|              |                      |            |                |
|              |                      |            |                |

