WILLIAMSBURGH
HOUSING ASSOCIATION LTD

~~Succession, Assignation, Sub Letting, Lodgers,~~

~~Joint Tenants & Mutual Exchange Policy~~

Tenancy Changes Policy

Revision History

Policy	~~Succession, Assignation, Sub Letting, Lodgers, Joint Tenants & Mutual Exchange Policy~~ Tenancy Changes Policy
Reviewer(s)	Louise McDonald
Committee Name	Operations and Performance
Number and Date of Meeting	
New Policy or Description of Revision	Revision
Equality Impact Assessment Complete	
Data Protection Impact Assessment Complete	
Health and Safety Risk Assessment Complete	
Consultation Complete	
Next Review Date	

This policy is available in different languages and other formats such as Braille or tape on request.

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Introduction

This policy sets out how we will manage requests for succession, assignation, sub-letting, lodgers, joint tenancies and mutual exchanges to Williamsburgh Housing Association, as set out in the Housing (Scotland) Act 2001, as amended by the Housing (Scotland) Act 2014 and the Housing (Scotland) Act 2025, and the Association's Scottish Secure Tenancy Agreement. For tenancies created on or after 1 August 2026, this policy should be read alongside the Scottish Government's New Model Scottish Secure Tenancy Agreement 2026 and any updated tenancy agreement adopted from that date.

There are conditions and qualifying time periods required before these requests can be approved.

Equal Opportunities

The Association is committed to the principles of equality, diversity, inclusion and good practice. In this regard, we acknowledge the Scottish Social Housing Charter, effective from 1 November 2022, Outcome 1: Equalities, which states:

"every tenant and other customer has their individual needs and rights recognised, is treated fairly and with respect, and receives fair access to housing and housing services".

Accordingly, we shall ensure that, in relation to succession, assignation, sub-letting, lodgers, joint tenancies and mutual exchanges, all customers are treated fairly and with respect. We will not discriminate on the grounds of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex or sexual orientation, and will make reasonable adjustments where required.

Scottish Social Housing Charter and Legal Framework

The Association, in preparing this policy and the related procedures has given consideration to and sought compliance with, the following:

Scottish Social Housing Charter, effective from 1 November 2022, as defined by the Scottish Housing Regulator – the regulatory body for housing associations. The relevant Charter Outcome numbers 7, 8, 9 and 11 state:

7, 8 and 9: Housing options

Social landlords work together to ensure that:

"people looking for housing get information that helps them make informed choices and decisions about the range of housing options available to them"

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"tenants and people on housing lists can review their housing options"
Social landlords ensure that:

"people at risk of losing their homes get advice on preventing homelessness"

11: Tenancy sustainment

Social landlords ensure that:

"tenants 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".

Legal Framework

This policy operates within the context of the following legislation:

- **The Housing (Scotland) Act 2001** – establishes the framework for Scottish Secure Tenancies and sets out tenants' rights and landlords' responsibilities.
- **The Housing (Scotland) Act 2014** – introduces amendments to the 2001 Act, including changes to succession rights, assignation, subletting, and joint tenancies.
- **The Matrimonial Homes (Family Protection) (Scotland) Act 1981** – provides protection for the rights of spouses, civil partners, and cohabitants to occupy the family home.
- **The Housing (Scotland) Act 2025** – introduces further amendments relevant to Scottish secure tenancies, including changes to qualifying periods for succession and delivery of notices from 1 August 2026.
- **The Domestic Abuse (Protection) (Scotland) Act 2021** – introduces provisions relevant to social landlords' management of tenancies in cases involving abusive behaviour from 1 August 2026.
- **The Data Protection Act 2018 and UK General Data Protection Regulation** – set out requirements for the lawful, fair, transparent and secure processing of personal information.
- **The Equality Act 2010** – provides protection from discrimination and informs the Association's duties when delivering housing services.

Succession

Succession to a tenancy occurs following the death of a tenant when someone already living in the property wishes to become the new tenant and they are entitled to do so. Only "qualifying persons" who have lived in the property can succeed to the tenancy.

There are conditions and qualifying time periods required before a succession can be approved.

Qualifying Period

There is no qualifying period for the tenant's spouse, civil partner or joint tenant provided (in all cases) that the person's only or principal home was the house in question at the time of the tenant's death.

A person falling within the following categories are qualified persons where the house has been their only principal home throughout the 6 months ending in the tenant's death:

- Partners (cohabitants of either sex and including same sex cohabitants);
- Members of the tenants family aged 16 or over; and
- Carers aged 16 or over who have given up a previous only or principal home.

To have the right to succeed to a tenancy after living in the house for 6 months, the "qualifying person" or the tenant must also have notified the Association that the person wishing to succeed to the tenancy is living in the house and that the house is that person's only or principal home. From 1 August 2026, the qualifying period for succession is reduced from 12 months to 6 months under the Housing (Scotland) Act 2025. The Association will apply the qualifying period required by law at the date of the tenant's death.

The ~~12 month~~ qualifying period does not start until that notice has been given. The tenant (or any one of joint tenants) or the person who has moved into the house are responsible for notifying the Association that the person has moved in.

Tenants can notify the Association in writing by letter or e-mail and should receive written confirmation back. Without our written confirmation that we have received and approved or rejected your request, a succession will not proceed, especially as someone moving into the property may result in overcrowding where permission may be refused.

Should there be exceptional circumstances, then these will be considered under the Associations Allocations Policy, 'Exceptions to the policy, including special lets and management transfers'.

It should be noted that succession as described above does not apply where the tenancy is a Short Scottish Secure Tenancy (SSST).

Levels of Succession

Level 1: Joint Tenant
Spouse
Co-habitee (needs to reside at property for 6 months as only and principal home prior to death)

Level 2: Any other member of the family, as long as only and principal home (needs to reside at property for 6 months as only and principal home prior to death)

Level 3: Carers (16 years and over) – only if principal home and prior home has been given up (needs to reside at property for 6 months as only and principal home prior to death)

Only 2 rounds of succession can be granted – the only exception to this rule would be if 3rd succession is a joint tenant. A 6 month occupancy can be offered to anyone who would normally have succeeded tenancy however 2 rounds have already occurred.

If more than 1 person qualifies to succeed to tenancy they must decide who will take over within 4 weeks, failure to do so will result in the Association ~~making the decision.~~ seeking legal advice on the best way to proceed.

Where an applicant does not meet the criteria for succession, Williamsburgh Housing Association will consider carefully all of the circumstances of the individual case and consider whether it is appropriate to allocate a new tenancy for the same or another property, to them.

Adapted Properties

If a house or flat has been designed or adapted for someone with special needs to use, it can only be handed on to a husband, wife, civil partner, joint tenant or partner. It cannot be passed to members of their family or carers unless they have special needs. If they do not, they have the right to be offered another suitable home.

Persons Who Are Entitled To Succeed But Do Not Wish To Do So

If someone qualifies at any level to succeed to the tenancy but does not wish to become the tenant, they should confirm this in writing within four weeks of the death of the tenant and leave the house within six months, rent will be charged only for the actual period of occupation after the tenant's death.

Tenancy Agreement

The successor (including Joint Tenants) will not sign a new tenancy agreement, as this would create new tenancy and further rights of succession. The successor will be asked to sign a variation to the existing tenancy agreement.

Carers

There will be some cases when an individual has given up their main residence to care for a Williamsburgh Housing Association tenant but have not informed us they have moved in, and the tenant dies before the 6 month qualifying period has been met.

We recognise that there may be genuine reasons why a carer or tenant has not told WHA of the changes to the household composition. This could include where the carer moved in following a medical emergency or where they were providing a high level of care which left them with little time for seeking out information or support, or informing us they have moved in.

Where an applicant does not meet the criteria for succession, Williamsburgh Housing Association will consider carefully all of the circumstances of the individual case and consider whether it is appropriate to allocate a new tenancy for the same or another property, to them.

~~Limits On Succession~~

~~The Association will permit a tenancy to be inherited on a maximum of two occasions (subject to the criteria set out above) under the provisions of our Scottish Secure Tenancy Agreement.~~

~~If a tenancy has already been inherited twice, the third death will normally end the tenancy. The tenancy will not end, however if there is a surviving joint tenant whose Scottish Secure Tenancy will continue.~~

~~If there is still a person in the house who would otherwise qualify to inherit the tenancy under succession if it had not been previously succeeded to on two occasions, the tenancy will continue for up to 6 months after the last death. The resident will be given a Short Scottish Secure Tenancy to occupy the accommodation while alternative accommodation is secured.~~

~~Whilst there is no statutory obligation to permit a third tenancy, in certain circumstances the Housing Manager/Head of Housing may grant a new tenancy to a person who would meet the qualifying criteria. Each case will be considered on its own merits.~~

Assignation Requests

Assignation is the legal term used to describe the voluntary transfer of all your rights and responsibilities under your tenancy to another person. This person is known as an assignee.

The assignee takes over the tenancy and becomes the tenant from an agreed date, and takes over your tenancy rights and responsibilities, including the responsibility to pay rent and any outstanding housing debt.

A Scottish secure tenant is not allowed to assign her/his tenancy without first obtaining Williamsburgh Housing Association's written consent. Such consent cannot be withheld unreasonably.

Assignation involves a transfer of tenancy to another person(s).

If you want to pass your tenancy to another person, the following must apply:

- The person you want to pass it on to must be 16 years old or over.
- They must have filled in and returned a housing application form to us.
- The house must have been their only or main home for at least 12 months before the date you apply to pass on your tenancy. The 12 month period does not start until the Association has been notified that the person is living in the property as their only or principal home.
- If you have a joint tenancy, you must get agreement from the other joint tenants to pass on the tenancy. If you have a husband, wife or civil partner, you must get their agreement to pass on your tenancy.

Sub-Letting

Sub-letting is when a tenant rents all or part of their home to another person (the sub-tenant) on a temporary basis.

Tenants wishing to sub-let all or part of their home must make such an application in writing. The sub-let cannot proceed without our written consent. We will not withhold permission unreasonably. We will provide a standard application form on which a request for permission to sub-let can be made.

The tenant must provide the following information;

- The reason for the sub-let.
- The proposed duration of the sub-let.
- The amount of any deposit and the rent charges relating to the sub-let.
- The full name, date of birth and current address of the proposed sub-tenant.

The tenant must have held the tenancy for that property for at least 12 months prior to the date of application to sub-let. Or, if they were not the tenant throughout that time period, the house must have been their only or principal home during those 12 months; and the person who was the tenant at that time must have notified the Association that the person who is now the tenant was living there. The 12 month period does not start until the Association has been notified.

Subject to all conditions being met, permission will be granted for a sub-let for a maximum initial period of 6 months. At the end of the period the tenant must return to the property.

Tenants who have permission to sub-let must advise the Association of any proposed rent increase from the level initially agreed. The granting of a sub-let does not remove or set aside any of the responsibilities of the tenant regarding the conduct of the tenancy, irrespective of any arrangement the tenant may have with the sub-tenant. The tenant remains responsible for ensuring that the rent is paid and

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that all other tenancy conditions are adhered to.

Depending on the circumstances, a sub-tenant may be a “qualifying occupier” for the purposes of the Housing (Scotland) Act 2001 (s14(6)), and may require to be included in any court proceedings raised against the tenant.

Lodgers

Tenants wishing to take in a lodger must make such an application in writing. The lodger cannot move in without our written consent. We will not withhold permission unreasonably. We will provide a standard application form on which a request for permission to take in a lodger can be made.

The tenant must provide the following information:

- The proposed duration of the lodging arrangement.
- The amount of any deposit and the rent charges to be paid by the lodger.
- The full name, date of birth and current address of the proposed lodger.

There are no residency tests for either the tenant or the proposed lodger.

Depending on the circumstances, a lodger may be a “qualifying occupier” for the purposes of the Housing (Scotland) Act 2001 (s14(6)), and may require to be included in any court proceedings raised against the tenant.

Joint Tenancies

A request to create a joint tenancy is where the tenancy was originally in a sole name but that sole tenant now wishes to add another person to their tenancy.

The current sole tenant and new intended joint tenant must make such an application in writing. The joint tenancy cannot be created without our written consent. We will not refuse a request for a joint tenancy unreasonably. We will provide a standard application form on which a request for a joint tenancy can be made.

The tenant must provide the following information;

- The full name, date of birth and relationship to the tenant of the proposed joint tenant.

There is a residency test which must be satisfied which is that the person who wishes to become the joint tenant must have been living in the property and using it as their only or principal home for at least 12 months prior to the date of the application to become a joint tenant.

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Furthermore, Williamsburgh Housing Association must have been informed that the person the current sole tenant wishes to become a joint tenant has moved into the property and have granted permission for that residence. The 12 month qualifying period only starts when the Association has been notified. The residency test applies regardless of the relationship between the tenant and intended joint tenant, and includes spouses, civil partners and co-habiting partners.

There is no statutory timeframe within which we must respond to requests for a joint tenancy, however, we will respond to requests within one month.

When permission for a joint tenancy is granted the tenancy does not end and a new tenancy does not begin. Rather the tenancy continues but the tenant changes (from sole names to joint names) from a specified date. No new tenancy agreement is required. The application for a joint tenancy and the Association's letter granting permission is appended to the original tenancy agreement.

The current tenant and new joint tenant will be asked to sign a variation to the original tenancy agreement, confirming that they understand that the tenancy will change from a specified date and this will also be appended to the original tenancy agreement.

Mutual Exchanges

A mutual exchange is a swap of properties between two (or occasionally more) social housing tenants. All social housing tenants have a right to apply for a mutual exchange with an identified other party. A mutual exchange can take place between two tenants of Williamsburgh Housing Association, or between a tenant of Williamsburgh Housing Association and a tenant of any other social landlord.

Williamsburgh Housing Association recognises the role that mutual exchanges play in supporting housing mobility, meeting housing need and meeting housing aspirations.

An application for a mutual exchange must be made in writing. A mutual exchange cannot go ahead without our consent, or that of the other landlord. We will not refuse a request for a mutual exchange unreasonably. We will provide a standard application form on which a request for a mutual exchange can be made.

There is no residency test for parties to a mutual exchange.

The Association will respond in writing to requests for a mutual exchange within one month, either approving or refusing permission for the mutual exchange to proceed. If we fail to respond within one month of receipt of an application then the Association is taken to have consented to the application.

We would not normally give consent for a mutual exchange which would result in a property being underoccupied/overcrowded.

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We will seek a landlord reference for any parties to a mutual exchange who are not existing tenants.

If the exchange is approved, the landlord(s) will agree an appropriate date for the mutual exchange in consultation with the exchanging tenants.

Incoming tenants accept the fixtures and fittings of the house as seen.

The incoming tenant signs a new tenancy agreement and the tenancy of the outgoing tenant is terminated.

In cases of mutual exchanges involving more than two tenancies all of the same conditions apply.

Reasons Why Consent May Be Withheld

We will not give you permission to succeed, assign, sub let, take in a lodger, joint tenancy or carry out a mutual exchange if we have good reasons for refusing, such as the following examples:

- We have served a notice on you to warn you that we may take action to evict you because of your behaviour.
- Applications for succession will be refused where the applicant cannot demonstrate to the satisfaction of the Association that they are a qualified person as defined within this policy for the duration of the qualification period of 6 months, where applicable.
- We have an order to evict you.
- The property would become overcrowded.
- The person who wants to take over the property has been convicted of anti social behaviour in the last 12 months or has a current anti social behaviour order.
- Passing on the tenancy would mean that we are not acting in line with our allocations policy.
- If another person's occupancy rights are likely to be affected if we gave you permission to pass on the tenancy.
- Where, in the Association's opinion, the assignation would result in the home being under occupied
- The residency and notification requirement has not been satisfied
- The proposed assignation/exchange would result in specially adapted accommodation (such as wheelchair housing) being occupied by a person who did not require such accommodation
- It appears to the Association that the tenant is to receive a payment for the sub-let, which is other than a reasonable rent or a reasonable and returnable deposit.

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- It appears to the Association that the tenant is to receive a payment for the lodging arrangement, which is other than a reasonable rent or a reasonable and returnable deposit.
- The Association proposes to carry out work to the house or building which would affect the accommodation likely to be used by the sub-tenant/lodger or other person who would reside in the house as a result of the transaction.
- The house is unsuitable for the needs of the tenant's household.
- It appears to the Association that one or other tenant is to receive a payment for the mutual exchange.

Assessing Applications

Before we can consider an application, we must receive all the information requested. We may also carry out interviews. When assessing the application we will also consider the housing need in the area.

When we have all of the information required, we will give our decision in writing within one month of getting the application. We will not refuse permission without a good reason, and if we refuse to give permission we will tell you why and how you can appeal against our decision.

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Complaints and Appeals

Although we are committed to providing high levels of service, we accept that there may be occasions where tenants or other customers are not satisfied with the service they have received from us. We value complaints and feedback and use this information to help us improve our services. Our Complaints Policy describes our complaints procedure, how to make a complaint, how complaints are investigated, and how decisions can be escalated where appropriate.

Unlike other tenants' rights, the Housing (Scotland) Act 2001 does not give you the right to appeal to the sheriff court if we refuse your application for succession. However, we have our own appeals system.

If we refuse your application, you can ask for the Housing Manager/Head of Housing to review the decision.

Should any tenant be dissatisfied with the implementation of this policy they should submit a complaint to the Association in order to get the matter resolved.

If, after completing the Association's complaints procedure, a tenant remains dissatisfied, they may ask the Scottish Public Services Ombudsman (SPSO) to consider the complaint. The SPSO is normally the final stage for complaints about housing associations and other public services in Scotland.

SPSO
Bridgeside House
99 McDonald Road
Edinburgh
EH7 4NS
(if you would like to visit in person, you must make an appointment first)

Their freepost address is:

FREEPOST SPSO
Freephone: 0800 377 7330
Online contact **www.spso.org.uk/contact-us**
Website: **www.spso.org.uk**

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Data Protection

The Association will handle personal information carefully and keep it secure, whether it is held on paper, on our computer systems, or through approved cloud services. Access to personal information will be limited to staff and authorised partners who need it to carry out their role. We will keep information only for as long as it is needed for the purpose it was collected, or where we are required to keep it by law, and will securely delete, archive, or dispose of it when it is no longer required. At all times, we will act in line with the Data Protection Act 2018 and the UK General Data Protection Regulation (UK GDPR).

Review

This policy will be reviewed by the Committee on a 3 yearly basis, to ensure that it responds to any changing circumstances.

This review will take place following the appropriate consultation with tenants as outlined in our Tenant Participation Strategy.

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Appendix 1

Application to Assign a Scottish Secure Tenancy

Assigning your tenancy is where you pass on your tenancy, including all of your rights and responsibilities, to another person (known as an assignee). If you want to pass on your tenancy, please fill in this form. The person who you want to take over your tenancy must have lived with you for at least 12 months prior to your application. The 12 month period does not start until the Association has been notified that the person is living in the property as their only or principal home. **Please refer to the 'Assigning Your Tenancy' leaflet prior to submitting this application.**

Current Tenancy Details

Name of Tenant: _____

Address: _____

_____

Contact Phone Number: _____

Tenancy Start Date: _____

Household Composition			
Name	**Age**	**Relationship to You**	**Remaining in Property**

Do you have a spouse/civil partner? Yes / No

If yes, has your spouse/civil partner given their permission to assign your tenancy? Yes / No

Are you a joint tenant? Yes / No
(All joint tenants must sign the application form)

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Property Details

Property Type:

Tenement Flat ☐ Floor level _____

Own Door Flat ☐

Four in a Block ☐ Upper/Lower _____

House ☐

Was the house purpose built for someone with a disability or have any adaptions been made? Yes / No

If yes, do you or a member of your family have a disability? Yes / No

Have you made any improvements? Yes / No

Details

Reasons for Assignation

Why do you want to assign your tenancy?

When do you want to assign your tenancy? Please give a date

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Intended Forwarding Address

Name of Tenant: _____

Address: _____

_____

Postcode: _____

Contact Phone Number: _____

Details of Assignee(s)

Name: _____

Address: _____

_____

Postcode: _____

Contact Phone Number: _____

Date of Birth: _____

Relationship to Tenant: _____

Sight of Identification documents will be required, e.g birth certificate, driving license, passport.

Is this property your main home? Yes / No

If so, how long have you resided at this property? _____

You are required to provide proof that this has been your main home. Examples of this would be confirmation from the local authority that you are noted as part of the household, your driving license indicating you have changed address, bank statements.

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Details of other people who will be living with the Assignee		
Name	**Age**	**Relationship**

Does the Assignee or any person living with the assignee have any medical condition that will require the property to be adapted? Yes / No

If yes, give details

Does the Assignee have a housing application with Williamsburgh Housing Association? Yes / No

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I confirm that all the above information is correct.

I consent to this information being checked and understand that you may seek to obtain further relevant details in relation to my housing circumstances

I understand that any information I provide will be handled in accordance with the Data Protection Act 2018 and UK GDPR. The Association will use this information to assess and administer this application and will only share it where there is a lawful basis for doing so.

I can confirm that the above information is true. I understand that if the assignation is granted to the person detailed in question 12, that I will have no rights or obligations to the above tenancy.

Tenants Signature: _____

Date: _____

Joint Tenants Signature: _____

Date: _____

Spouse/Civil Partner Signature: _____

Date: _____

- I can confirm that all my answers on this form are true and that I want to become the tenant of the property detailed in question 1. I confirm that this address has been my main home throughout the 12 months prior to the date of this request.
- I give you my permission to check the information I have given in this form or obtain further relevant details in relation to my housing circumstances.
- I understand that the information provided in this form will be handled in accordance with the Data Protection Act 2018 and UK GDPR and will only be shared where there is a lawful basis for doing so.

Proposed Assignee Signature: _____

Date: _____

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Appendix 2

Application For Sub Let

Sub-letting is when a tenant rents all or part of their home to another person (the sub-tenant) on a temporary basis. The tenant must have held the tenancy for that property for at least 12 months prior to the date of application to sub-let. Or, if they were not the tenant throughout that time period, the house must have been their only or principal home during those 12 months; and the person who was the tenant at that time must have notified the Association that the person who is now the tenant was living there. The 12 month period does not start until the Association has been notified.

Current Tenancy Details

Name of Tenant: _____

Address: _____

_____

Contact Phone Number: _____

Tenancy Start Date: _____

Household Composition			
Name	**Age**	**Relationship to You**	**Remaining in Property**

Do you have a spouse/civil partner? Yes / No

If yes, has your spouse/civil partner given their permission to sublet the property? Yes / No

Are you a joint tenant? Yes / No
(All joint tenants must sign the application form)

Property Details

Property Type:

Tenement Flat ☐ Floor level _____

Own Door Flat ☐

Four in a Block ☐ Upper/Lower _____

House ☐

Was the house purpose built for someone with a disability or have any adaptions been made? Yes / No

If yes, do you or a member of your family have a disability? Yes / No

Have you made any improvements? Yes / No

Details

Reasons for Sublet

Why do you want to sublet your property?

When do you want to sublet your property? Please give dates from and to

Intended Forwarding Address for the proposed period of subletting

Name of Tenant: _____

Address: _____

_____

Postcode: _____

Contact Phone Number: _____

Details of Person(s) wishing to sublet

Name: _____

Address: _____

_____

Postcode: _____

Contact Phone Number: _____

Date of Birth: _____

Relationship to Tenant: _____

Sight of Identification documents will be required, e.g birth certificate, driving license, passport.

Details of other people who will be living with the Sublet		
Name	**Age**	**Relationship**

Please give details of your prospective sub-tenant's last three addresses			
Address	From	To	Name and Address of Landlord

Has your sublet applicant ever held a tenancy with a Council or any other Housing Association? If YES, please give details (if not listed above)

Address	From	To	Name and Address of Landlord

Does the sublet applicant or any person living with them have any medical condition that will require the property to be adapted? Yes / No

If yes, give details

Does the sublet applicant have a housing application with Williamsburgh Housing Association? Yes / No

What rent is proposed to be charged to the sub tenant?	£ Per week/month
What other proposed payments are to be made (if any)?	£ Per week/month
Will the proposed sub tenant be entitled to Housing Benefit/Universal Credit?	YES / NO

I confirm that all the above information is correct.

I consent to this information being checked and understand that you may seek to obtain further relevant details in relation to my housing circumstances

I understand that any information I provide will be handled in accordance with the Data Protection Act 2018 and UK GDPR. The Association will use this information to assess and administer this application and will only share it where there is a lawful basis for doing so.

Tenants Signature: _____

Date: _____

Joint Tenants Signature: _____

Date: _____

Spouse/Civil Partner Signature: _____

Date: _____

- I can confirm that all my answers on this form are true and that I want to become the sublet tenant of the property detailed in question 1.
- I give you my permission to check the information I have given in this form or obtain further relevant details in relation to my housing circumstances.
- I understand that the information provided in this form will be handled in accordance with the Data Protection Act 2018 and UK GDPR and will only be shared where there is a lawful basis for doing so.

Proposed Sublet Signature: _____

Date: _____

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Appendix 3

Application to take in a Lodger

A lodger is a guest in your home, who pays you rent. You would continue to live in the property, and let a room out for rent. You also become responsible for the conduct of your lodger in the property. You cannot take in a lodger without our permission in writing beforehand, which we would not unreasonably refuse.

Current Tenancy Details

Name of Tenant: _____

Address: _____

_____

Contact Phone Number: _____

Tenancy Start Date: _____

Household Composition			
Name	**Age**	**Relationship to You**	**Remaining in Property**

Do you have a spouse/civil partner? Yes / No

If yes, has your spouse/civil partner given their permission to take in a lodger? Yes / No

Are you a joint tenant? Yes / No
(All joint tenants must sign the application form)

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Property Details

Property Type:

Tenement Flat ☐ Floor level _____

Own Door Flat ☐

Four in a Block ☐ Upper/Lower _____

House ☐

Was the house purpose built for someone with a disability or have any adaptions been made? Yes / No

If yes, do you or a member of your family have a disability? Yes / No

Have you made any improvements? Yes / No

Details

Reasons for taking in a Lodger

Why do you want to take in a lodger?

When do you want to take in a lodger? Please give dates from and to

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Details of Proposed Lodger

Name: _____

Address: _____

_____

Postcode: _____

Contact Phone Number: _____

Date of Birth: _____

Relationship to Tenant: _____

Sight of Identification documents will be required, e.g birth certificate, driving license, passport.

Please give details of your prospective lodger's last three addresses			
Address	From	To	Name and Address of Landlord

Has your proposed lodger ever held a tenancy with a Council or any other Housing Association? If YES, please give details (if not listed above)

Address	From	To	Name and Address of Landlord

Does the proposed lodger have any medical condition that will require the property to be adapted? Yes / No

If yes, give details

Does the proposed lodger have a housing application with Williamsburgh Housing Association? Yes / No

What rent is proposed to be charged to the lodger?	£ Per week/month
What other proposed payments are to be made (if any)?	£ Per week/month
Will the proposed lodger be entitled to Housing Benefit/Universal Credit?	YES / NO

I confirm that all the above information is correct.

I consent to this information being checked and understand that you may seek to obtain further relevant details in relation to my housing circumstances

I understand that any information I provide will be handled in accordance with the Data Protection Act 2018 and UK GDPR. The Association will use this information to assess and administer this application and will only share it where there is a lawful basis for doing so.

Tenants Signature: _____

Date: _____

Joint Tenants Signature: _____

Date: _____

Spouse/Civil Partner Signature: _____

Date: _____

- I can confirm that all my answers on this form are true and that I want to become the lodger of the property detailed in question 1.
- I give you my permission to check the information I have given in this form or obtain further relevant details in relation to my housing circumstances.
- I understand that the information provided in this form will be handled in accordance with the Data Protection Act 2018 and UK GDPR and will only be shared where there is a lawful basis for doing so.

Proposed Lodger Signature: _____

Date: _____

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Appendix 4

Application for a Joint Tenancy

A request to create a joint tenancy is where the tenancy was originally in a sole name but that sole tenant now wishes to add another person to their tenancy.

There is a residency test which must be satisfied which is that the person who wishes to become the joint tenant must have been living in the property and using it as their only or principal home for at least 12 months prior to the date of the application to become a joint tenant. Furthermore, Williamsburgh Housing Association must have been informed that the person the current sole tenant wishes to become a joint tenant has moved into the property and have granted permission for that residence. The 12 month qualifying period only starts when the Association has been notified. The residency test applies regardless of the relationship between the tenant and intended joint tenant, and includes spouses, civil partners and co-habiting partners.

Current Tenancy Details

Name of Tenant: _____

Address: _____

_____

Contact Phone Number: _____

Tenancy Start Date: _____

Household Composition			
Name	**Age**	**Relationship to You**	**Remaining in Property**

Do you have a spouse/civil partner? Yes / No

If yes, has your spouse/civil partner given their permission to create a joint tenancy? Yes / No

Are you a joint tenant? Yes / No
(All joint tenants must sign the application form)

Property Details

Property Type:

Tenement Flat ☐ Floor level _____

Own Door Flat ☐

Four in a Block ☐ Upper/Lower _____

House ☐

Was the house purpose built for someone with a disability or have any adaptions been made? Yes / No

If yes, do you or a member of your family have a disability? Yes / No

Have you made any improvements? Yes / No

Details

_____

_____

_____

Details of Proposed Joint Tenant

Name: _____

Address: _____

_____

Postcode: _____

Contact Phone Number: _____

Date of Birth: _____

Relationship to Tenant: _____

Sight of Identification documents will be required, e.g birth certificate, driving license, passport.

Does the proposed joint tenant have any medical condition that will require the property to be adapted? Yes / No

If yes, give details

_____

_____

_____

I confirm that all the above information is correct.

I consent to this information being checked and understand that you may seek to obtain further relevant details in relation to my housing circumstances

I understand that any information I provide will be handled in accordance with the Data Protection Act 2018 and UK GDPR. The Association will use this information to assess and administer this application and will only share it where there is a lawful basis for doing so.

Tenants Signature: _____

Date: _____

Joint Tenants Signature: _____

Date: _____

Spouse/Civil Partner Signature: _____

Date: _____

- I can confirm that all my answers on this form are true and that I want to become the joint tenant of the property detailed in question 1.
- I give you my permission to check the information I have given in this form or obtain further relevant details in relation to my housing circumstances.
- I understand that the information provided in this form will be handled in accordance with the Data Protection Act 2018 and UK GDPR and will only be shared where there is a lawful basis for doing so.

Proposed Joint Tenant Signature: _____

Date: _____

Mutual Exchange Application Form

Please ensure that both applicants complete all relevant sections. Answer every question and provide any supporting information requested. Missing or incomplete information may delay the assessment of the application.

Part 1: WHA Tenant Information

Personal Details

Details	WHA Tenant
Full name	
Current address	
Telephone number	
Email address	
Current landlord	Williamsburgh Housing Association
Monthly rent	£

Household Members Included in the Exchange

Full name	Date of birth	Relationship to tenant

Reason for the Exchange

Please explain why you want to exchange your home.

Current Property Details

Property details	Response
Number of single bedrooms	
Number of double bedrooms	

Housing Requirements

Requirement	Response
Do you require wheelchair-accessible accommodation?	Yes / No
Do you require amenity accommodation?	Yes / No
Do you require an additional bedroom?	Yes / No
If yes, provide the reason and further details.	

Personal Connections with Housing Associations

Do you have a relevant connection?	Yes / No
If yes, provide details.	

Part 2: Exchange Applicant Information

Personal Details

Details	Exchange Applicant
Full name	
Current address	
Telephone number	
Email address	
Current landlord	
Monthly rent	£

Household Members Included in the Exchange

Full name	Date of birth	Relationship to applicant

Reason for the Exchange

Please explain why you want to exchange your home.

Current Property Details

Property details	Response
Number of single bedrooms	
Number of double bedrooms	

Housing Requirements

Requirement	Response
Do you require wheelchair-accessible accommodation?	Yes / No
Do you require amenity accommodation?	Yes / No
Do you require an additional bedroom?	Yes / No
If yes, provide the reason and further details.	

Personal Connections with Housing Associations

Do you have a relevant connection?	Yes / No
If yes, provide details.	

Guidance and Declaration

Amenity accommodation: Amenity properties are normally on the ground floor and may have a level-access shower or a shower over the bath. They may include adaptations for minor medical needs, such as lever taps, higher electrical sockets and lower light switches.

Additional bedroom: Reasons may include receiving care, health or medical needs, joint custody arrangements, accommodating medical equipment, or enabling someone to provide support.

Personal connections: A relevant connection includes a current or former employee or board member of a registered social landlord, or their close relative. For this purpose, “former” means within the 12 months before the application date.

Additional Information

Please provide any other relevant information.

Declaration and Signatures

We confirm that the information provided is complete and accurate. We authorise our current landlords to provide Williamsburgh Housing Association with tenancy references for the purpose of assessing our mutual exchange application.

We understand that any information provided will be handled in accordance with the Data Protection Act 2018 and UK GDPR. The Association will use this information to assess and administer this application and will only share it where there is a lawful basis for doing so.

Applicant	Signature	Date
WHA Tenant		
Applicant 2		

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Application to Succeed to a Scottish Secure Tenancy

If you believe you may have the right to succeed to a tenancy, please complete this form so that the Association can assess whether the legal criteria are met. Succession is a legal right where the statutory conditions are satisfied. The Association will confirm in writing whether succession has been accepted.

To have a right to succeed to a tenancy, you must be a qualifying person and the property must have been your only or principal home for the required qualifying period. The qualifying period starts from the date the Association was notified that you were living in the property as your only or principal home. From 1 August 2026, the qualifying period for succession is reduced from 12 months to 6 months under the Housing (Scotland) Act 2025. The Association will apply the qualifying period required by law at the date of the tenant's death.

Please refer to the 'Succession' leaflet prior to submitting this application.

Current Tenancy Details

Name of Tenant: _____

Date of Death: _____

Sight of a death certificate will be required.

Property Details

Address: _____

_____

Property Type:

Tenement Flat ☐ Floor level _____

Own Door Flat ☐

Four in a Block ☐ Upper/Lower _____

House ☐

Was the house purpose built for someone with a disability or have any adaptions been made? Yes / No

If yes, do you or any member of your household require the adaptations or specialist features in the property? Yes / No

Applicant Details

Name of Applicant: _____

Date of Birth: _____

Relationship to Tenant: _____

Sight of Identification documents will be required, e.g birth certificate, driving license, passport.

Is this property your only or principal home? Yes / No

If so, how long have you resided at this property? _____

You are required to provide proof that this has been your only or principal home. Examples may include confirmation from the local authority that you are noted as part of the household, a driving licence showing the address, bank statements, benefit records, utility bills or other official correspondence.

Date the Association was notified you were living at the property as your only or principal home: _____

Who provided the notification? Tenant / Applicant / Joint tenant / Other: _____

Did the Association issue written confirmation that the notification had been received? Yes / No

Were you the tenant's Carer? Yes / No

If you were the tenant's carer, did you give up your previous only or principal home to provide care? Yes / No

Please provide evidence of your previous address and the date you gave it up, where applicable.

What was your last address? _____

_____

Were you the Tenant ☐

Owner ☐

Other ☐ Details _____

Household Composition

Are there any other persons currently residing in the property? Yes / No

Name	Relationship to you	Date of birth	Do they live in the house now?

Will this person(s) continue to reside at the property should it be determined that you have succession rights? Yes / No

The Association will confirm its decision in writing. If succession is not confirmed, the decision letter will explain the reasons and how you may request an internal review.

I confirm that all the above information is correct.

I understand that any information I provide will be handled in accordance with the Data Protection Act 2018 and UK GDPR. The Association will use this information to assess and administer this application and will only share it where there is a lawful basis for doing so.

I consent to this information being checked and understand that you may seek to obtain further relevant details in relation to my housing circumstances

Applicant Signature: _____

Date: _____