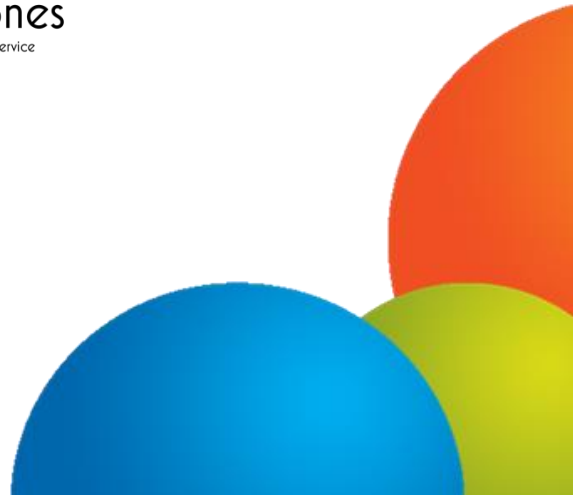


Policy

Title: Mutual Exchange Policy

Author:	Head of Neighbourhoods
Approved by:	Calico Homes Board
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This document relates to:



Policy

1. Introduction

- 1.1 The Mutual Exchange Policy details how and when tenancies can be exchanged and will be used for Calico Homes tenants resulting in customers having an understanding of our offer.
- 1.2 Calico is committed to creating and maintaining sustainable tenancies and neighbourhoods.
- 1.3 This policy applies to all customers who have an applicable Calico Homes tenancy agreement.

2. Context

This policy has been developed to ensure that Calico Homes is fully compliant with all relevant legislation and regulations relating to mutual exchange.

3. Policy Aims and Objectives

The aims of the policy are:

- To communicate clearly and transparently the types of tenancy where mutual exchange is a tenancy right.
- To demonstrate how we will make the mutual exchange offer accessible, tailoring the service to best meet the needs of the individual.
- To set out how we will grant mutual exchanges.
- To set out how we will ensure compliance with ongoing legal and regulatory requirements.

The Calico Homes Vision

“Going one step further with customers and local communities to provide affordable, safe and quality homes and personalised services; supporting customers to live their best lives in challenging times.”

The Calico Homes objectives:

- To provide safe and well-maintained homes through investment in existing and new properties.
- To support customers to sustain tenancies.
- To provide good quality and personalised repairs, customer and neighbourhood services.
- To develop trusting relationships and to empower customers and communities to take the lead on the things that matter most.
- To strengthen the business so it is strong, well-governed, environmentally friendly and provides value for money customers.
- To create a place where people want to work now and in the future.

4.0 Customer Scrutiny, Oversight and Monitoring

- 4.1 Calico Homes values transparency and accountability in our mutual exchange offer and management processes.
- 4.2 We commit to publishing information about our performance so that customers can see how the service is performing, and what tenancies have been granted along with sustainability levels.
- 4.3 We encourage customers to provide feedback on their tenancy experience. Whether positive or negative, customer input helps us continuously improve our services.

5. Right to Mutual Exchange

- 5.1 Mutual Exchange is a right that some customers have once they become an assured tenant. A mutual exchange takes place when one customer exchanges their tenancy with another. This means that they swap homes and most rights and responsibilities included in their tenancy agreements.
- 5.2 Mutual Exchange is a right of Assured and Transfer Assured tenancies and is not applicable to Starter Tenancies.

6. Mutual Exchange Policy Statement

- 6.1 As a landlord we take responsibility for creating and maintaining sustainable neighbourhoods reducing tenancy turnover.
- 6.2 Where a customer has been identified as vulnerable we will ensure they have access to additional support to help understand the mutual exchange process. Customers or applicants can be supported by a representative or advocate in interactions about tenancy related matters.
- 6.3 Calico Homes will promote the use of mutual exchange to encourage tenant mobility and to create sustainable communities.

7. Mutual Exchange policy description

- 7.1. Calico Homes use Home Swapper, a tool for social tenants (in rented properties) who want to mutually exchange. We allow all eligible customers access to this service free of charge.
- 7.2 All customers who have found a suitable match will be required to submit the details to Calico who will assess the application under the agreed criteria detailed in the Mutual Exchange Procedure.
- 7.3 The consent of all landlords' involved must be obtained before any exchange takes place.
- 7.4 Mutual exchanges are carried out by deed of assignment. No customer can go ahead with a mutual exchange without the permission of Calico Homes. Any customer who does so without permission may be required to move back to their previous home and will be recharged for any costs.
- 7.5 In exceptional circumstances Calico Homes may use discretion to authorise a mutual exchange that does not meet all of the criteria. Where this is done the exchanging parties must sign an undertaking agreeing to accept the property in its current condition.
- 7.6 Calico Homes will respond to Home Swapper registration requests within five working days.
- 7.7 We will acknowledge requests for a mutual exchange, once the customer has identified a match, within five working days and must be dealt with within 42 (forty-two) days starting from receipt of the completed application form. Calico Homes will lose its legal right to withhold consent if the application is not dealt with within this timeframe.
- 7.8 During the home visit at the properties, the Neighbourhood Officer will complete a home visit form which will include ensuring that the properties are not suffering from damp, mould, condensation or any other major repairs.
- 7.9 If a mutual exchange is not approved and the customer(s) feel dissatisfied with the decision made, they should appeal the decision through Calico Homes Complaints Procedure

8. Reasonable Adjustments

- 8.1 It is our policy to ensure that discretion is used in cases of identified vulnerabilities such as disability, frailty, domestic abuse, concern for welfare or any other identified need. Calico will use information provided

by customers and held in our systems to assist in identifying responsibilities. We will also ask customers and applicants if there are any issues that need to be considered to help us make appropriate decisions when offering a tenancy.

- 8.2 In cases where abuse is identified or suspected at the point of offering a tenancy a safeguarding notification will be made.

9. Monitoring

- 9.1 Monitoring of the delivery of this policy will include the production of monthly reports to enable operational managers to effectively monitor the performance and progress of the service.
- 9.2 Board members are responsible for overseeing delivery of this policy. To do this they will receive regular updates about performance of the service and delivery of the policy on a quarterly basis with extra reporting by exception if required.
- 9.3 We will monitor customer satisfaction levels and seek feedback following each let. Where dissatisfaction is indicated, we will attempt to contact the customer to understand what has gone wrong and look to make things right.
- 9.4 Customer feedback received via transactional surveys and the Tenant Satisfaction Measures will be used to actively improve the service being offered.

10. Regulatory and Legal Compliance

- Social Housing (Regulation) Act 2023
- Landlord and Tenant Act 1985
- Housing Act 2004
- Health and Safety at Work act 1974
- Management of Health and Safety at Work Regulations 1999 (as amended)
- Equality Act 2010

11. Links with other Calico Strategies, Policies and Procedures

- The Humanitarian Offer – Calico Group Customer Strategy
- Tenancy Fraud Policy
- Tenancy Sustainment Policy
- Starter Tenancy Procedure
- Lettings and Allocations Policy
- Complaints Policy and Procedures
- Health and Safety Policy
- Compensation Policy
- Reasonable Adjustments Policy
- Tenancy/License/Lease agreements
- Employee Code of Conduct

