

**Policy Name: Medical Adaptations Policy**

**Policy Number: M11**

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<b>Responsible Executive</b>	Director of Property and Development		
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# Contents

1.	Introduction.....	3
2.	Scope of the Policy.....	3
3.	Policy Aims and Objectives.....	3
4.	Definitions.....	4
5.	Procurement Requirements.....	6
6.	Funding Medical Adaptations.....	7
7.	Delivery of the Service.....	8
8.	Roles and Responsibilities.....	9
9.	Legal and Regulatory Framework.....	10
10.	Communication and Awareness.....	12
11.	Risk Management.....	13
12.	Improvement, Monitoring and Review.....	14
13.	Training and Competency.....	16
14.	Key References and Supporting Documents.....	17
15.	General Data Protection Regulations.....	18
16.	Equality, Diversity and Inclusion.....	18
17.	Approval and Review History.....	18

## **1. Introduction**

Clyde Valley Housing Association (CVHA) is committed to supporting tenants to live safely, independently and with dignity in their homes for as long as possible. Medical adaptations play an important role in helping to meet the changing needs of tenants where illness, disability, age or reduced mobility affects their ability to access or remain in their home safely.

This Policy sets out Clyde Valley's approach to the assessment, prioritisation, funding, delivery and management of medical adaptations within our housing stock. It provides the framework for a fair, consistent and efficient service that responds to identified need, makes best use of available resources and supports compliance with relevant legal, regulatory and good practice requirements.

Through this Policy, Clyde Valley aims to ensure that medical adaptations are considered and delivered in a timely, transparent and person-centred way, working in partnership with tenants, occupational therapists, health and social care professionals and contractors where required.

## **2. Scope of the Policy**

This Policy applies to the management of medical adaptations within CVHA's rented housing stock where a tenant has been assessed as requiring a permanent adaptation to support independent living, improve accessibility or reduce risk within the home. It covers the arrangements for referral, assessment, prioritisation, approval, funding, procurement, installation and review of qualifying medical adaptations.

The Policy also sets out the roles and responsibilities of tenants, relevant employees, occupational therapists and contractors involved in the process, and establishes the principles by which decisions will be made to ensure fairness, consistency, transparency and effective use of available resources.

This Policy does not cover routine repairs, cyclical maintenance, temporary aids, general housing improvements, or works that do not arise from an assessed medical or accessibility need. It should be read alongside associated procedures and any related policies governing repairs, asset management, procurement, equality and data protection.

## **3. Policy Aims and Objectives**

CVHA is committed to delivering a medical adaptations service that is person-centred, fair, efficient and sustainable. The aim of this Policy is to support tenants to remain in their homes safely, independently and with dignity where this is appropriate, by ensuring that medical adaptations are assessed, prioritised, funded and delivered in a consistent and effective manner.

The key aims of this Policy are to:

- put the needs of tenants first and ensure a person-centred approach to the assessment and delivery of medical adaptations.
- support tenants to remain in their own homes, where appropriate, by arranging suitable and proportionate adaptations that meet assessed need.
- ensure resources are directed to those with the greatest need through a fair, transparent and consistent approach to assessment and prioritisation.
- maximise the use of available funding and other resources, including external grant support where available, while securing value for money.
- ensure that adapted properties are appropriately identified and recorded so that they can be allocated effectively to households with a relevant assessed need when they become available.

- administer referrals and requests for medical adaptations effectively, working with occupational therapists, health and social care professionals and other relevant partners.
- work collaboratively with local authority, health and other partner agencies to support timely and appropriate delivery of adaptations.
- comply with all relevant legal, regulatory and good practice requirements in relation to equality, accessibility, procurement, health and safety and housing management.

Our objectives for the medical adaptations service are to:

- provide a prompt, efficient and cost-effective medical adaptations service.
- support the independence, wellbeing and dignity of tenants by adapting existing homes wherever this is feasible and appropriate.
- ensure that adaptations undertaken are appropriate to assessed need and are capable of being used effectively within the constraints of the property.
- provide clear housing options advice where a home cannot reasonably or economically be adapted to meet the tenant's needs.
- make best use of adapted housing stock by seeking to allocate vacant adapted properties to applicants or tenants with similar assessed needs, where appropriate.
- procure suitably qualified and competent contractors to carry out adaptation works to the required standard.
- maintain effective systems, controls and procedures to ensure medical adaptations are delivered efficiently, effectively and economically.
- operate clear monitoring, record-keeping and reporting arrangements, including audit trails, to support oversight, assurance and continuous improvement.
- maximise any grant funding and external support available to CVHA for medical adaptations.
- seek and use tenant feedback to inform ongoing service improvement.
- support compliance with the Scottish Social Housing Charter by contributing to tenancy sustainment, service accessibility and value for money.

Key outcomes of operating this Policy effectively include improved tenancy sustainment, a positive tenant experience, better use of adapted housing stock and the delivery of value for money. Performance will be monitored through relevant operational and charter indicators, including:

- No18: Number of households currently waiting on adaptations to their home.
- No 19: Average time to complete adaptations.

#### 4. Definitions

For the purposes of this Policy, the following definitions apply. These definitions are intended to support a clear, consistent and shared understanding of the key terms used in relation to the referral, assessment, approval, funding, delivery and management of medical adaptations. They should be read alongside the wider Policy and associated procedures.

Key Term	Definition
Adapted Property	A property that has already been altered or fitted with specialist features or equipment to meet an identified medical, disability or accessibility need.
Affordable Housing Supply Programme (AHSP)	The Scottish Government funding programme through which grant assistance may be available to support certain medical adaptations and other affordable housing activity.
Applicant	A person applying for housing with CVHA who may require an adapted property because of a medical condition, disability or reduced mobility.

<b>Key Term</b>	<b>Definition</b>
Assessment	The process of considering a tenant's or applicant's needs, usually informed by advice from an occupational therapist or other relevant professional, to determine whether an adaptation is necessary, reasonable and practicable.
Case Priority	The relative urgency assigned to an adaptation request based on assessed need, risk, available resources and any supporting professional recommendation.
Common Areas	Shared areas serving more than one property, such as closes, entrances, paths, ramps, lifts, bin areas or shared access routes.
Contractor	A suitably qualified and competent external organisation or individual appointed by CVHA to carry out adaptation works, surveys, installations or associated services.
Customer / Tenant	The person who holds, or is proposed to hold, a tenancy with CVHA and who may request or benefit from a medical adaptation.
Disabled Person	A person who meets the definition of disability set out in the Equality Act 2010, namely a physical or mental impairment that has a substantial and long-term adverse effect on their ability to carry out normal day-to-day activities.
Grant Funding	External financial support available to CVHA, where applicable, to assist in meeting the cost of eligible medical adaptations.
Major Adaptation	An adaptation involving more significant building or alteration work, greater cost or structural change, such as level-access showers, stairlifts, ramped access, widening doors or through-floor lifts.
Medical Adaptation	A physical alteration, installation or change to a property carried out to meet an assessed medical or disability-related need and to improve safety, accessibility or independent living.
Minor Adaptation	A lower-cost or less complex adaptation that can usually be installed quickly and with limited disruption, such as grabrails, lever taps, handrails or small threshold alterations.
Occupational Therapist (OT)	A qualified health or social care professional who assesses how a person manages everyday activities and may recommend adaptations to support safety, independence and access within the home.
Permanent Medical Adaptation	A fixed or lasting alteration to the property intended to meet a continuing or long-term need, rather than a temporary aid or short-term adjustment.
Priority Rehousing	The process of giving preference, in line with allocation rules, to applicants or tenants whose assessed needs are best met by an existing adapted property rather than by carrying out new works.
Referral	A formal request or recommendation for an adaptation, usually received from a tenant, occupational therapist, social work service, medical professional or other authorised party.
Routine Repair	A repair required to maintain the property in good condition which does not arise from an assessed medical or disability-related need and is therefore not classed as a medical adaptation.
Scottish Social Housing Charter	The outcomes and standards set by the Scottish Government against which social landlords' performance is assessed, including outcomes relevant to access to housing, tenancy sustainment and value for money.
Temporary Aid	Portable or non-fixed equipment, such as bath boards, commodes or free-standing aids, which are generally provided through health or social care arrangements rather than as permanent property adaptations.

Key Term	Definition
Value for Money	The effective, economic and efficient use of available funding and resources to achieve the best outcomes for tenants and the organisation.

## 5. Procurement Requirements

CVHA will procure works, goods and services required to support the delivery of medical adaptations in a manner that is lawful, proportionate, transparent and capable of demonstrating value for money. Procurement activity undertaken under this Policy will align with CVHA's Procurement Policy and Procedures, relevant delegated authority arrangements and all applicable procurement legislation and internal controls.

Where external contractors or specialist suppliers are required, CVHA will select the most appropriate procurement route based on the nature, value, urgency and complexity of the works. This may include the use of existing term contracts, framework agreements, mini-competitions, quotation processes or formal tender exercises, provided that the route used is compliant with procurement requirements and delivers an appropriate balance of quality, responsiveness and cost.

CVHA will ensure that a clear and proportionate specification or scope of works is prepared for medical adaptation works before procurement is undertaken, reflecting the assessed needs of the tenant, any relevant occupational therapist recommendations, property constraints, health and safety requirements and the intended outcomes of the adaptation. Specifications will be sufficiently detailed to support effective pricing, delivery and contract management.

Contractors appointed to undertake medical adaptations must be suitably qualified, competent and experienced in delivering the type of work required. CVHA will seek assurance, as appropriate to the contract, in relation to technical competence, trade accreditation, insurance, health and safety arrangements, safeguarding awareness, equality obligations, financial standing, references and previous performance.

All procurement activity relating to medical adaptations will be undertaken in accordance with applicable public procurement requirements, CVHA's contract standing orders and financial regulations. Where required, tender documentation and evaluation criteria will reflect the need for safe delivery, quality workmanship, tenant care, programme management, compliance with specification and whole-life value rather than cost alone.

In procuring medical adaptation works, CVHA will seek to achieve value for money through appropriate competition, effective planning, clear specifications, robust evaluation and active contract management. Where adaptations are supported by grant funding or other external resources, procurement and delivery arrangements will support proper stewardship of those funds and compliance with any relevant funding conditions.

Procurement arrangements for medical adaptations must also support a tenant-centred service. Contractors and suppliers will be expected to carry out works with appropriate regard to communication, dignity, access arrangements, cleanliness, vulnerability, safeguarding and minimising disruption to tenants and other occupants during surveys, installations and follow-on works.

CVHA will maintain appropriate arrangements for the monitoring and management of contractors engaged in medical adaptation works. This will include, where relevant, oversight of timescales, quality of workmanship, compliance with specification, health and safety performance, customer care, defects management, record keeping and completion information, with any poor performance, non-compliance or emerging risks addressed through established contract management processes.

Where required by the nature of the works, CVHA will ensure that appropriate inspections, testing, certification, warranties, operation information and completion records are obtained and retained. These records will support quality assurance, future maintenance, auditability and the effective management of adapted properties over time.

CVHA will not permit any contractor or operative to undertake medical adaptation works unless satisfied that they are competent to do so and have been appointed through an appropriate procurement or contractor engagement process. Any specialist works must be undertaken by appropriately trained and authorised personnel and, where necessary, in accordance with manufacturer requirements and relevant technical standards.

## **6. Funding Medical Adaptations**

Expenditure on medical adaptations will vary from year to year according to assessed need, historic demand, available budgets and any external grant support available to CVHA, including grant subsidy allocation provided by Scottish Government.

Medical adaptations will only be approved and instructed where there is clear confirmation that funding is available within the relevant budget provision or through an agreed alternative funding source. Budget management arrangements will seek to ensure that expenditure is profiled and monitored throughout the year so that available resources are used effectively and commitments are made in a controlled and transparent manner.

Where external grant funding is insufficient or unavailable, CVHA may consider funding permanent medical adaptations from its own budgets where this is justified, affordable and represents an appropriate use of resources. In such cases, a clear business case should be prepared and approved in line with delegated authority arrangements before works are committed. The business case should set out the nature of the assessed need, the estimated cost of the proposed works, alternative options considered, the expected benefit to the tenant, and the rationale for proceeding.

CVHA recognises that there may be a strong rationale for investing in adaptations to an existing home, particularly where the tenant has long-term needs, established care or support networks, and where remaining in the current property is likely to provide the most appropriate and sustainable outcome. Decisions will, however, be taken on a case-by-case basis and will reflect both individual circumstances and the responsible stewardship of organisational resources.

Assessment and prioritisation of adaptation requests will normally be informed by recommendations from an Occupational Therapist or other appropriately qualified professional, together with CVHA's assessment of the property, the proposed works, cost, urgency and available funding. Resources will be directed to those cases demonstrating the greatest need, taking account of risk, urgency, feasibility and the likely benefit of the adaptation.

A property will generally only be adapted where other reasonable housing options have been considered and ruled out, where sufficient funding is available, where the proposed work is technically feasible and can be carried out economically, and where adapting the property is considered to represent the best use of the housing stock in meeting current and future housing need. This includes consideration of whether an existing adapted property or an alternative rehousing solution may provide a more suitable outcome.

Where funding constraints, property constraints or wider housing management considerations mean that a requested adaptation cannot reasonably be progressed in the form originally proposed, CVHA will, where appropriate, consult with the tenant, Occupational Therapist and any relevant partner agencies to consider alternative solutions. This may

include reduced specification, phased works, alternative forms of assistance or housing options advice where rehousing would better meet the tenant's assessed needs.

CVHA will maintain appropriate records of funding decisions, committed expenditure and completed works to support financial control, auditability and service monitoring. Oversight of expenditure and demand will help inform future budget planning, funding bids and service improvement, and will support assurance that resources are being applied fairly, consistently and in line with this Policy.

## **7. Delivery of the Service**

CVHA will promote awareness of the medical adaptations service through appropriate communication channels, which may include tenant publications, the website, tenancy information and other customer communication methods. Where significant changes are proposed to this Policy or the service model, CVHA will engage with tenants in line with its customer engagement arrangements to support transparency, service improvement and informed policy development.

Before adapting an existing home, CVHA will consider whether the tenant's needs could be met more appropriately through rehousing to a property that is already suitable or more readily adaptable. CVHA will also seek to make best use of adapted housing stock by identifying, where possible, households whose assessed needs match vacant adapted properties. In most cases, however, and where this is feasible, reasonable and affordable, CVHA will seek to support tenants to remain in their existing home through the provision of appropriate adaptations.

CVHA is responsible for permanent adaptations to tenants' homes where these are supported by an appropriate assessment and approved in line with this Policy. Depending on individual need, property type and technical feasibility, this may include:

- Level-access showers.
- Provision of ground floor WC or bathing facilities.
- Installation of lever taps.
- Provision of permanent access ramps.
- Internal or external handrails
- Widening of doors or access points
- Non-slip flooring.
- Other similar measures designed to improve accessibility, safety and independent living.

The examples given are not exhaustive, and other requests may be considered on a case-by-case basis.

Lower-value minor works may, where reasonable and appropriate, be progressed through responsive repairs or other approved operational budgets where this is consistent with internal financial controls and funding availability. These may only be instructed by the Director of Property and Development.

CVHA will not normally approve property extensions or major structural alterations and will only consider such works in exceptional circumstances where all other reasonable options have been explored and discounted, and where the works are judged to represent an appropriate and proportionate response within the context of asset management priorities, technical feasibility and available resources. Where alternative funding for such works is secured from other sources, CVHA will consider any associated request for consent reasonably and in accordance with its responsibilities as landlord.

CVHA's responsibility is primarily in relation to permanent property adaptations. Temporary aids, portable equipment and certain specialist items may fall within the remit of health or

social care services rather than the landlord. Where this applies, CVHA will work with the tenant and relevant partner agencies to clarify responsibilities and to support the most appropriate overall solution. Examples of items this may include are:

- Specialist bathing equipment.
- Raised toilet seats.
- Stair/bath lifts.
- Removable ramps.

Assessments will normally be carried out and prioritised on the basis of recommendations from an Occupational Therapist or other suitably qualified professional, supported by CVHA's own assessment of the property, urgency, risk and available resources. CVHA will maintain appropriate records of requests for adaptations and their status so that cases can be managed in a fair, consistent and transparent manner.

Where available funding is limited, it may only be possible to progress cases above a defined priority threshold; lower-priority referrals will be retained for review and may be progressed if circumstances or resources change. Where a tenant's condition changes, a request may be reassessed on receipt of updated professional advice.

In relation to new build development, CVHA will seek to incorporate relevant accessibility and inclusive design standards at the earliest possible stage and will engage with local authority and other partners, where appropriate, to identify households with particular needs. Where reasonable and practicable, specific accessibility requirements should be addressed during design and construction so that homes are better suited to both current and future needs and avoid unnecessary retrospective adaptation. CVHA will also seek to engage with local authority partners early in the development process, and through the Common Housing Register, to identify households with particular needs.

CVHA will apply any available VAT relief or exemption appropriately where the qualifying conditions for adaptation works are met and the necessary supporting documentation is in place. The selected Contractor will be provided with a VAT Exemption Form, signed by CVHA.

Once installed, CVHA will maintain approved adaptations where they continue to be required and form part of the property. Where an adaptation is no longer required because of a change in personal circumstances, rehousing or tenancy termination, CVHA may decide to retain, alter or remove the adaptation, taking account of future housing need, condition, safety, cost and the potential for re-use.

## 8. Roles and Responsibilities

Clear roles and responsibilities are essential to the effective delivery, oversight and assurance of the medical adaptations service. This section sets out the key responsibilities of those involved in the approval, assessment, prioritisation, funding, procurement, delivery, monitoring and review of medical adaptations, so that accountability is understood and the service operates in a consistent, transparent and well-governed manner.

Responsibilities should be read alongside CVHA's wider governance framework, delegated authority arrangements, financial regulations, procurement requirements and any associated medical adaptations procedures. While some responsibilities are strategic and oversight-focused, others relate to day-to-day operational delivery and partnership working.

Role	Key Responsibilities	Accountability
Board	Approve the Policy and receive assurance that CVHA has appropriate arrangements in place for the governance, resourcing, monitoring and review of the medical adaptations service.	Strategic approval and oversight

<b>Role</b>	<b>Key Responsibilities</b>	<b>Accountability</b>
Director of Property and Development	Act as Responsible Executive for this Policy; ensure appropriate strategic oversight, governance, resources and controls are in place; approve decisions within delegated authority; and ensure appropriate performance, compliance and risk reporting is provided.	Executive accountability
Repairs and Maintenance Manager	Act as Policy Owner; maintain and review the Policy and associated procedures; oversee operational delivery of the service; ensure cases are managed consistently; support budget monitoring, contractor oversight, record keeping and service improvement; and escalate issues, risks or exceptions as required.	Policy ownership and operational management
Property Services / Operational Staff	Administer referrals and adaptation requests; liaise with tenants, occupational therapists and contractors; arrange surveys, quotations and works; maintain accurate records; monitor progress, costs and completion; and ensure the service is delivered in line with approved procedures and tenant care expectations.	Day-to-day delivery
Customer Success Team	Support the identification and allocation of adapted properties; work with relevant teams where rehousing may offer a more suitable option; ensure relevant property information is recorded to support best use of adapted stock; and contribute to communication with tenants and applicants where required.	Allocation and housing management support
Occupational Therapist / Relevant Health or Social Care Professional	Assess the tenant's needs and, where appropriate, provide recommendations to inform the nature, urgency and priority of an adaptation request. Support reassessment where circumstances change and work with CVHA to consider alternative solutions where a requested adaptation is not feasible or proportionate.	Professional assessment and recommendation
Finance Team	Support financial control arrangements, budget monitoring, grant accounting where applicable and compliance with financial regulations, delegated authority limits and audit requirements relevant to medical adaptations expenditure.	Financial governance and control
Contractors	Deliver adaptation works safely, competently and in accordance with the agreed specification, programme, contract requirements and relevant legal and technical standards. Contractors are also responsible for appropriate tenant communication, protecting health and safety, minimising disruption and providing required completion information, certification and defects rectification.	Contract delivery
Tenants	Provide relevant information to support assessment of need; engage with CVHA and relevant professionals during the process; provide reasonable access for surveys and works; raise any change in circumstances that may affect priority or need; and use installed adaptations appropriately and report defects or issues promptly.	Engagement and access responsibilities

## 9. Legal and Regulatory Framework

CVHA will deliver the medical adaptations service within the framework of applicable legislation, regulatory standards and national guidance. This Policy should be read and implemented in a way that supports legal compliance, fair and consistent decision-making, appropriate partnership working and effective assurance that tenants' needs are being met in a lawful, safe and person-centred manner.

Legislation / Regulatory Requirement	Relevance to this Policy	CVHA Implications
Equality Act 2010	Provides the legal framework in relation to disability, discrimination and equality of opportunity. It is relevant to how CVHA assesses need, communicates with tenants, considers reasonable steps, and ensures fair access to housing and housing services.	CVHA must deliver services in a way that avoids discrimination, advances equality and takes proper account of disabled tenants' needs.
Housing (Scotland) Act 2001	Relevant to allocations and housing management, including the treatment of applicants and tenants with particular housing or medical needs and the best use of adapted housing stock.	CVHA should ensure that adapted properties and rehousing options are considered appropriately within allocations and tenancy management processes.
Housing (Scotland) Act 2010	Establishes the Scottish Social Housing Charter and the framework through which social landlords are assessed in relation to service outcomes and standards.	CVHA must operate this service in a way that supports charter outcomes, performance reporting and service improvement.
Scottish Social Housing Charter (November 2022)	Sets out the outcomes and standards tenants and other customers should expect from social landlords, including equalities, communication, participation, housing quality, access to housing, tenancy sustainment and value for money.	CVHA should ensure the adaptations service contributes to tenancy sustainment, accessible services and value for money, and supports ARC reporting where relevant.
Scottish Housing Regulator ARC guidance	Provides the performance reporting framework for Annual Return on the Charter submissions, including indicators relevant to waiting times and completion of adaptations.	CVHA must maintain accurate records, robust calculations and appropriate assurance over any charter data relating to this service.
Equipment and Adaptations: Guidance on Provision (Scottish Government, 2023)	Sets out national guidance on partnership responsibilities and good practice for equipment, adaptations and housing solutions, including the importance of early discussion of wider housing options and joint working.	CVHA should work collaboratively with occupational therapists, local authority and health partners, and consider rehousing or wider housing solutions where appropriate.
Housing for Varying Needs Design Guide / Accessible Housing Standards	Provides design guidance and accessibility principles relevant to new build housing and the creation of homes capable of meeting varying and changing needs over time.	CVHA should take account of accessibility and adaptability standards in development activity and when planning homes for current and future needs.

Legislation / Regulatory Requirement	Relevance to this Policy	CVHA Implications
Health and Safety at Work etc. Act 1974 and related health and safety duties	Relevant to the safe management of surveys, installations, contractor activity and works undertaken in tenants' homes and communal areas.	CVHA must ensure that adaptation works are specified, procured, delivered and monitored in a way that protects tenants, staff, contractors and others.
VAT Act 1994 / HMRC VAT relief guidance for disabled people	Relevant to the correct treatment of VAT for certain qualifying adaptation works, goods or services provided for disabled people, subject to the applicable rules and conditions.	CVHA should ensure that any available VAT relief or exemption is applied correctly and supported by the required declarations and records.

## 10. Communication and Awareness

Effective communication and appropriate awareness arrangements are essential to the consistent implementation of this Policy. CVHA will ensure that the Medical Adaptations Policy is communicated in a way that supports understanding of its purpose, requirements, roles and operational implications across the organisation and, where relevant, among tenants and partner stakeholders.

Communication arrangements will be proportionate to the significance of the Policy and any changes made to it. Particular emphasis will be placed on ensuring that those with direct responsibilities for assessment, approval, delivery, procurement, monitoring and tenant communication understand the requirements of the Policy and any associated procedures, while tenants are able to access clear information about the service in an appropriate and accessible format.

CVHA will ensure that communication with tenants and applicants about the medical adaptations service is clear, accessible and customer focused. Information will explain how to request an adaptation, how assessments and prioritisation operate, what tenants can expect during the process, and where to obtain further support or advice. Where required, information will be provided in accessible formats and communication methods appropriate to individual need, so far as reasonably practicable.

This Policy will be made available to relevant employees through CVHA's internal systems and document management arrangements and will be published externally where required in line with CVHA's policy publication approach. Key stakeholders with responsibilities under this Policy will receive appropriate awareness of its requirements and of any associated procedures. Where the Policy is reviewed and updated, communication will be proportionate to the nature of the changes made. Minor or administrative updates may be communicated through routine document control processes, while material changes affecting roles, responsibilities, controls or operational practice will be supported by targeted briefing, awareness activity and, where appropriate, updated guidance.

Staff Group	Training / Awareness Required	Method
Board and Executive Leadership Team	Awareness of the purpose of the Policy, key compliance expectations, strategic risks, assurance arrangements and any material changes affecting governance, service delivery or resourcing.	Board / committee reporting, approval papers and management briefings

Staff Group	Training / Awareness Required	Method
Director of Property and Development and Policy Owner	Detailed understanding of policy requirements, delegated authority, governance arrangements, monitoring expectations, funding controls, procurement implications and review responsibilities.	Targeted briefing, policy review process and management meetings
Property Services / Operational Staff	Practical awareness of referral handling, assessment processes, prioritisation, record keeping, procurement interfaces, contractor management, tenant communication and escalation routes.	Team briefing, procedure guidance, one-to-one instruction and operational meetings
Customer Success Team	Awareness of rehousing considerations, adapted stock management, communication with tenants and applicants, and the relationship between this Policy and allocations or tenancy sustainment activity.	Service briefing, guidance notes and cross-team communication
Finance and Contract Management Staff	Awareness of budgetary controls, approval requirements, grant considerations, procurement compliance and any contract management expectations relevant to adaptation works.	Targeted briefing and access to policy / procedure documents
All Employees	General awareness that the Policy exists, where it can be accessed, and how to direct tenants or colleagues to the appropriate service area where queries arise.	Internal publication, briefing process and intranet / document management access
Tenants and Applicants	Access to clear, accessible information about the medical adaptations service, how to request support, how cases are assessed and prioritised, what to expect during delivery of the service, and how to obtain updates, advice or information in alternative formats where required.	Website, tenant publications, tenancy information, direct correspondence and accessible communication on request

## 11. Risk Management

Risk management is integral to the effective delivery of the medical adaptations service. CVHA will identify, assess, manage and monitor risks associated with the funding, assessment, approval, procurement, delivery and ongoing management of medical adaptations so that tenants are supported safely, resources are used appropriately and service objectives can be achieved.

Risks arising from this Policy and its operation will be managed in line with CVHA's Risk Management Policy and associated assurance arrangements. This includes maintaining appropriate controls, identifying emerging issues, escalating material concerns through the appropriate management route and taking corrective action where weaknesses in process, compliance, capacity, funding or delivery are identified.

## 12. Improvement, Monitoring and Review

CVHA is committed to the continuous improvement of the medical adaptations service and to maintaining effective arrangements for monitoring performance, compliance and service quality. This section sets out how the Policy and associated service delivery arrangements will be reviewed, how assurance will be obtained and how learning will be used to strengthen outcomes for tenants, improve operational effectiveness and support good governance.

Monitoring and review arrangements will be proportionate to the significance of the Policy and the risks associated with the service. They will include routine operational monitoring, management oversight, performance reporting, review of complaints and feedback, and periodic policy review to ensure that the Policy remains effective, current and aligned to legal, regulatory and business requirements.

### Policy Review

This Policy will be formally reviewed by the Policy Owner at least every three years, or earlier where required by a change in legislation, regulation, regulatory expectations, organisational structure, service delivery model, identified control weakness or other material development. Reviews will take account of operational experience, tenant and stakeholder feedback, complaints, audit findings, performance trends, equality considerations and any learning arising from service delivery. Any material amendments will be progressed through CVHA's governance and approval arrangements and communicated in line with the Communication and Awareness section of this Policy.

### Internal Assurance

A formal system of monitoring the medical adaptations service will be established and maintained, with defined arrangements for reporting, escalation and corrective action. Internal assurance activity will support oversight of compliance with this Policy, the effectiveness of key controls and the quality and consistency of operational delivery. Monitoring arrangements will include, as a minimum, review of the following areas:

Monitoring Area	Approach / Frequency	Reporting / Escalation
Demand, waiting list and case priorities	Routine operational review of live cases, priority status, urgent referrals and waiting times.	Escalated through management routes where delays, backlogs or high-risk cases arise.
Timescales and service performance	Regular monitoring of referral-to-completion times, key milestones and relevant charter indicators.	Reported through operational and management reporting, with adverse trends investigated and addressed.
Budget, committed expenditure and funding availability	Regular review of expenditure, commitments, forecast outturn and funding utilisation.	Escalated where budget pressures, overspend risks or funding shortfalls are identified.
Quality of works and contractor performance	Ongoing review of quality, defects, tenant experience, compliance with specification and contractor responsiveness.	Managed through contract management arrangements and escalated where significant underperformance occurs.
Compliance with policy, procedures and record keeping	Periodic file reviews, control checks and management oversight of approvals, documentation and system records.	Control weaknesses or non-compliance will be addressed through action plans and management escalation.

Complaints, feedback and learning	Review of complaints, compliments, tenant feedback and lessons learned from cases or service issues.	Themes will inform service improvement actions and, where necessary, policy or procedure updates.
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## **Audit and Performance Reporting**

Performance information relating to the medical adaptations service will be reported through appropriate management and governance routes in line with CVHA's assurance framework. This may include routine operational reporting, management review and reporting to senior leadership or Board/Committee level where material performance issues, strategic risks, significant control weaknesses or key compliance matters arise. Internal audit or other assurance activity may also review aspects of the service where this is considered necessary on a risk-based basis.

To support effective oversight, challenge and continuous improvement, CVHA will maintain and review a suite of key performance indicators for the medical adaptations service. These indicators will be used to monitor demand, timeliness, financial performance, service quality, customer experience and the effective use of adapted housing stock. Performance trends will be reviewed regularly, with adverse performance, emerging risks or recurring issues investigated and addressed through appropriate management action.

Key performance indicators may include, but are not limited to:

- Number of households currently waiting for a medical adaptation.
- Average time taken to complete medical adaptations.
- Average time from referral receipt to assessment and decision.
- Percentage of urgent or high-priority cases progressed within target timescales.
- Number of overdue live cases exceeding target timescales.
- Total expenditure on medical adaptations against approved budget.
- Percentage of available grant funding utilised.
- Average cost per completed adaptation.
- Customer satisfaction with the medical adaptations service.
- Number of complaints relating to the medical adaptations service.
- Percentage of adapted vacant properties allocated to households with an identified assessed need.
- Number of cases where rehousing was identified as a more appropriate option than adaptation.
- Contractor performance against agreed service standards, including quality, timeliness and customer care.

## **External Assurance**

Where appropriate, CVHA may seek external assurance, specialist advice or independent review in relation to particular aspects of the medical adaptations service, including technical quality, compliance, governance or value for money. The need for such assurance will be determined on a proportionate and risk-based basis, taking account of the complexity of the service, identified issues, audit findings or emerging risks.

## **13. Training and Competency**

CVHA will ensure that employees involved in the delivery, management or oversight of the medical adaptations service have the appropriate knowledge, skills and awareness to discharge their responsibilities effectively. Training and competency arrangements will be proportionate to each role and will support safe, compliant and consistent implementation of this Policy and any associated procedures.

### **Specific Training Required**

All employees with responsibilities under this Policy must be familiar with its requirements and with their specific roles and responsibilities. Where a role involves direct responsibility

for assessment, referral handling, approval, procurement, contractor management, customer communication or performance monitoring, appropriate training, briefing or instruction will be provided on induction and refreshed periodically, and whenever there is a material change to legislation, regulation, guidance, process or internal controls.

### **Training Records**

Records of relevant training, briefing and awareness activity will be maintained through CVHA's usual learning and development arrangements. Managers are responsible for ensuring that employees complete any required training and that competence is supported through supervision, guidance and ongoing review where appropriate.

## **14. Key References and Supporting Documents**

This Policy should be read alongside the internal documents, external guidance and legislative references that support its implementation. Together, these documents provide the wider governance, procedural and good practice framework for the effective management of medical adaptations and help ensure that decisions are lawful, consistent, proportionate and tenant focused.

The documents listed below are not exhaustive and should be considered alongside any other relevant legislation, regulatory requirements, internal policies, procedures, technical standards or operational guidance that may apply from time to time.

### **Supporting Documents**

- Medical Adaptations Procedure.
- Allocations Policy / Lettings Policy.
- Repairs and Maintenance Policy.
- Asset Management Strategy and any associated asset management procedures.
- Procurement Policy, procurement procedures and contract standing orders.
- Financial Regulations and delegated authority arrangements.
- Risk Management Policy.
- Complaints Policy.
- Equality, Diversity and Inclusion Strategy / Policy.
- Data Protection Policy and associated privacy notices.
- Customer Engagement Strategy.
- Development procedures, design standards and new build specifications where relevant to accessible housing provision.

### **Key References**

- Equality Act 2010.
- Housing (Scotland) Act 2001.
- Housing (Scotland) Act 2010.
- Scottish Social Housing Charter and Annual Return on the Charter guidance.
- Equipment and Adaptations: Guidance on Provision (Scottish Government).
- Housing for Varying Needs and other relevant accessibility or inclusive design standards.
- Health and Safety at Work etc. Act 1974 and associated health and safety requirements.
- Public Contracts (Scotland) Regulations 2015 and Procurement Reform (Scotland) Act 2014, where applicable.
- VAT legislation and HMRC guidance relevant to qualifying adaptation works for disabled people.

- Any relevant guidance issued by the Scottish Housing Regulator, Scottish Government, local authority partners, health and social care services, or other recognised bodies relevant to medical adaptations and accessible housing.

## 15. General Data Protection Regulations

CVHA will process personal data in accordance with applicable data protection legislation, including the UK General Data Protection Regulation and the Data Protection Act 2018, and in line with CVHA's Data Protection Policy and associated privacy information. Personal data will only be collected, used, shared, retained and disposed of where this is necessary, lawful and proportionate for the purposes of delivering the medical adaptations service and meeting CVHA's legal and regulatory obligations.

## 16. Equality, Diversity and Inclusion

At Clyde Valley we value people and their diversity and strive to be inclusive. We respect others, regardless of personal differences and we listen to people to understand their needs and tailor our service accordingly. We will strive to promote equal access to our service for all members of the community and provide fair and equal treatment, promoting human rights in line with our Equality, Diversity and Inclusion Strategy and Policy.

## 17. Approval and Review History

This section records the approval, review and version history of the Policy, including any material amendments made, the author of change, and the date and level of approval.

Version	Author of Change	Changes	Approved by	Date Approved
1.0	Natalya Macholla	Rewrite onto the new policy template and full review.	Board	June 2026