

Performance, Conduct and Development Policy



Directorate: People & Inclusion

Issue Date: September 2026

Review Date: September 2029

Version: 1

1. Introduction

- 1.1. This policy sets out how Salix Homes manages and develops the skills, knowledge, experience of all colleagues and ensures that they exhibit the behaviours needed for their roles - to deliver high quality and respectful services.
- 1.2. This policy also identifies Salix Homes' approach to managing poor performance.
- 1.3. It also identifies the appropriate steps that Salix Homes will take to secure that the relevant individuals of our service providers also have the necessary skills, knowledge and experience and exhibit the behaviours needed for the services they provide to be of good quality as part of relevant management agreements.

2. Policy Statement

- 2.1. Salix Homes' approach to performance, conduct and development is built around:
- 2.2. **Values-led expectations:**
 - 2.2.1. Salix Homes' values and associated behavioural competencies are the foundation for competence and conduct:
 - **Trustworthy** (Accountable, Integrity)
 - **Successful** (Informed, Collaborative)
 - **Inclusive** (Advocate, Respectful)
- 2.3. **Customer Charter commitments:**
 - 2.3.1. Everyone's role contributes - directly or indirectly - to delivering the Customer Charter commitments (e.g., Voice, Respect, Communication, Safety, Services, Resolution, Accountability).

2.4. Code of conduct:

- 2.4.1. Salix Homes' Code of Conduct sets out the professional standards of behaviour expected from all colleagues, contractors and anyone delivering services on behalf of Salix Homes.
- 2.5. This policy is focused on improving colleague capability and confidence in practice, ensuring that learning and development translate into consistent decision-making, improved service quality and positive customer outcomes.

3. Definitions

- 3.1. **Performance and Development Conversation (P&D):** a structured, future focused discussion about outcomes, behaviours, learning, and support. It fulfils the appraisal/performance review expectations under the Competence & Conduct Standard.
- 3.2. **Behavioural Framework:** the organisation-wide articulation of expected behaviours aligned to Salix Homes' values and Code of Conduct, including role-relevant prompts to support consistent, judgement-based assessment in practice.
- 3.3. **Mandatory training:** training required by law, regulation, safety, or organisational policy (e.g., health & safety, safeguarding, information governance, equality, compliance refreshers, and any qualifications required by the Competence and Conduct Standard).
- 3.4. **Job-related training:** training required to perform a role safely and effectively (technical skills, systems, procedures, customer experience, contract management, etc.).
- 3.5. **Career development:** learning that builds capability for future roles (qualifications, leadership development, secondments, projects, mentoring).

4. Our Competence and Conduct Framework

- 4.1. We maintain an organisation-wide framework defining the behaviours and expectations required to deliver high-quality services, aligned to our values and Customer Charter.
- 4.2. The Behavioural Framework provides role-relevant prompts to support consistent interpretation of behavioural expectations across different roles and services.

4.3. Behavioural Expectations

- 4.3.1. All colleagues are expected to demonstrate Salix Homes' values and associated behavioural competencies, set out in Salix Homes' Code of Conduct.
- 4.3.2. These apply to all colleagues, regardless of role or seniority.

4.4. Policies and Procedures

- 4.4.1. Salix Homes maintains a comprehensive suite of policies and procedures. Some will apply to all colleagues, regardless of role, for example health and safety, data protection, dignity at work, etc. Others will be role-dependent, for example the Tenancy Management Policy, is more relevant to people within the Communities team.
- 4.4.2. Policies and procedures are accessible to all colleagues on the intranet. It is the responsibility of individuals to ensure that they understand and adhere to the relevant policies and procedures that apply to their role.

4.5. Job Role Profiles

- 4.5.1. Every role within the organisational structure has an approved job role profile that sets out the purpose and responsibilities of the role-holder.
- 4.5.2. Job role profiles also define the specific knowledge, skills and experience that are required to deliver the responsibilities of the role.

4.6. Evidence and assurance

- 4.6.1. We evidence competence (of an individual's ability to perform their role) and conduct (behaviours) through proportionate sources such as:
 - Manager observation and supervision
 - Quality checks / file or job audits
 - Customer feedback themes, including Tenant Satisfaction Measures (TSMs)
 - Complaints learning
 - Compliance metrics (e.g., safety checks completion, mandatory training completion)
 - Peer feedback and project outcomes
 - Reflective discussion notes captured by managers during P&D conversations

4.7. Embedding the framework

4.7.1. The competence and conduct framework describes “what” individuals do (job role profiles and policies and procedures), and “how” individuals should behave (code of conduct). It is embedded through:

- Induction and refresher training
- P&D conversations and development planning
- Management practice and leadership role modelling
- Celebrating positive demonstration of the behaviours through peer-to-peer recognition
- Consistent processes for managing concerns or misconduct

5. Our Performance and Development Framework

5.1. Purpose

5.1.1. P&D conversations:

- Align individual contribution to team/organisational priorities and customer outcomes
- Ensure colleagues can apply learning consistently in practice to deliver safe, effective and high-quality services
- Reinforce expected behaviours and conduct
- Identify learning needs, remove barriers and ensure that development is realistic and supported within available capacity.
- Support wellbeing, inclusion, and engagement
- Address underperformance early and fairly (support first, formal process where necessary).

5.2. Process

5.2.1. **Annual Review:** all colleagues take part in an annual cycle setting objectives and development priorities for the year ahead.

5.2.2. **Each colleague will have:**

- A small number of clear, role relevant objectives linked to team and organisational priorities
- Agreed milestones or measures of success
- A development plan covering mandatory learning, skills, knowledge, experience and behaviour (SKEB) development and career aspirations.

5.2.3. Regular Check-ins:

- At least once every six weeks for all colleagues

5.2.4. Every check-in conversation includes:

- Progress and strengths
- Immediate priorities
- Behaviour check-in using the Behavioural Framework to guide structured, role-relevant discussion
- Learning needs and wellbeing
- Agreed actions

5.3. Rating scale

5.3.1. To support fair, consistent and transparent Performance & Development (P&D) conversations, we use a simple rating scale covering two areas:

- Performance – how well colleagues deliver their agreed objectives, priorities, targets and milestones.
- Behaviours – how colleagues demonstrate our values (Trustworthy, Successful, Inclusive) in their day-to-day work and interactions.

5.3.2. The purpose of the rating scale is to:

- Summarise overall progress during the year
- Support balanced conversations about strengths and development
- Help identify where further support, learning or feedback is needed
- Ensure fairness and consistency across teams
- Provide assurance that colleagues continue to meet the standards required for their role, including the behaviours described in the Code of Conduct.

5.3.3. The focus of the process is on discussion and evidence of performance and behaviour in practice. The rating is used to summarise this and highlight where further development or support may be required.

5.4. Documentation

5.4.1. Salix Homes uses light-touch documentation to avoid unnecessary burden:

- The Behavioural Framework supports structured discussion and assessment of behaviours, with the rating scale used to summarise outcomes rather than complete the framework itself.
- Notes are required only where a behaviour is rated Needs Support (for their Performance) or Developing/Concerns (for their Behaviours), or where there are material safety concerns, or agreed development commitments.

5.5. Further details of the performance and development process, rating scale and documentation can be found in the Performance and Development Procedure.

6. Learning & Development (L&D)

6.1. Our commitment

6.1.1. Salix Homes will provide and promote learning opportunities so colleagues can:

- Maintain competence in their current role
- Meet regulatory and mandatory requirements
- Build capability aligned to future service needs
- Pursue career aspirations where feasible and aligned to organisational priorities.

6.1.2. Learning will be planned and prioritised with explicit consideration of operational capacity. Training and development activity will only be agreed where there is a clear understanding of how it will be supported in practice, ensuring colleagues and teams are not placed under unsustainable pressure and that learning can be applied effectively.

6.2. Types of learning we support

6.2.1. Salix Homes recognises that learning happens through multiple routes, including:

- Mandatory training (compliance, safety, core organisational requirements)
- Role/job-related training (technical, systems, customer experience, contract management)
- Professional development / qualifications (role-relevant vocational and professional)
- On-the-job learning (coaching, shadowing, buddying, supervised practice)
- Project work (stretch assignments, cross-team initiatives)
- Secondments (temporary placement in another team/role)

- Development roles / acting-up (time-limited opportunities with support)
- Mentoring and communities of practice.

6.2.2. Individuals can also request organisational support for study or training via the Request for Study or Training Policy.

7. Qualification Requirements (Competence & Conduct Standard)

7.1. Our approach

- 7.1.1. We will comply with qualification requirements introduced under the Government's Policy Statement on Qualifications Requirements for Social Housing.
- 7.1.2. The focus is on capability as an outcome rather than training as an activity, ensuring colleagues are confident and able to perform their roles consistently and effectively.

7.2. Identification of in-scope roles

- 7.2.1. In-scope roles are determined by the functions performed (not job titles) and whether a role has a substantive responsibility for managing housing management service delivery.
- 7.2.2. We will keep a register of roles identified as in-scope, review it at least annually, and update it when structures change.

7.3. Qualification planning and transition

- 7.3.1. We will maintain a qualification compliance plan showing who:
 - Already meets the requirement
 - Is working towards the requirement
 - Has a bridging/additional module requirement (where applicable)
 - Requires enrolment and by when.

7.4. Support for colleagues working towards qualifications

- 7.4.1. Support may include:
 - Study time (as agreed)

- Funding arrangements (as per Request for Study or Training Policy)
- Mentoring/coaching
- Workload planning and reasonable adjustments where needed.

7.4.2. Where a colleague does not achieve the required qualification within the stipulated timeframes, support requirements will be considered first, including making any reasonable adjustments, before taking any formal action, which could include instigating our Capability Policy.

8. Contractors and Service Providers

8.1. We will take steps to ensure that contractors and service providers delivering services on our behalf meet competence and conduct expectations, through:

- Ensuring that relevant contractors and service providers comply with qualification requirements introduced under the Government's Policy Statement on Qualifications Requirements for Social Housing
- Contract terms referencing behavioural expectations / Code of Conduct alignment
- Induction/briefing on key standards
- Contract management and performance reviews
- Access requirements for policies and procedures where relevant
- Escalation processes for breaches or performance concerns

9. Managing Underperformance and Conduct Issues

9.1. Support-first approach

9.1.1. Where a colleague is rated as "Needs Support" (for their Performance rating) or "Developing/Concerns" (for their Behaviours rating), managers will:

- Clarify expectations
- Agree a practical support plan (coaching, training, supervision, shadowing), taking into account any reasonable adjustments
- Agree review dates and measures of improvement
- Document only what is necessary and proportionate.

9.2. Formal processes

9.2.1. Where issues persist, or where there is serious risk to safety, compliance, customer trust, or professionalism, managers may escalate via:

- Capability (performance) process
- Disciplinary (conduct) process
- Safeguarding procedures
- Contract remedies (for contractors).

10. Tenant Influence and Accessibility

10.1. We will provide meaningful opportunities for tenants to shape and scrutinise:

- our competence and conduct approach (including this policy and the Code of Conduct), and
- how we demonstrate our culture and professionalism in practice.

10.2. We will ensure the Code of Conduct and relevant summaries are accessible and available to tenants (e.g., plain English, alternative formats on request).

11. Monitoring / Performance / Targets

11.1. Monitoring will focus on outcomes, including whether capability is improving, performance is becoming more consistent, and service quality and customer experience are strengthening.

11.2. We will monitor and report on:

- P&D conversation completion (6-weekly adherence)
- mandatory training compliance
- themes from behaviours ratings (strengths and development needs)
- qualification compliance progress for in-scope roles
- equality impacts (fairness, consistency across groups)
- evidence of service improvement linked to learning and customer feedback (Charter “Voice” and “Accountability”)

11.3. Reports will be shared with appropriate governance groups (e.g., SLT, Remuneration and Governance Committee, Audit and Risk Committee, Customer Committee, and Board) where relevant.

12. Roles / Responsibility

12.1. **Colleagues will:**

- Engage in P&D conversations and own agreed actions

- Raise any capacity constraints, barriers to applying learning, or support needs with their manager in a timely way, so that development remains realistic and effective in practice
- Complete mandatory training and maintain role competence
- Adhere to the Code of Conduct and values-based behaviours

12.2. Line managers will:

- Hold timely P&D conversations (every six weeks as a minimum)
- Apply the Behavioural Framework consistently, using professional judgement supported by role-relevant prompts and evidence
- Identify learning needs, remove barriers, and follow up actions
- Ensure that development and support result in improved performance, capability and consistency in practice
- Consider operational capacity when agreeing training and development, ensuring that learning is prioritised, realistic and supported in practice, and that individuals and teams are not placed under unsustainable pressure
- Address underperformance promptly and supportively
- Ensure mandatory training compliance

12.3. People Services Team will:

- Maintain policy, tools, and guidance
- Provide support on capability, conduct, and learning pathways
- Support managers to develop capability and confidence in applying the behavioural framework consistently and using professional judgement
- Provide guidance and oversight to ensure that learning and development activity is planned in a proportionate and sustainable way, balancing organisational need, regulatory requirements and operational capacity
- Maintain reporting dashboards (completion, themes, training compliance)
- Oversee fairness, inclusion and consistency

12.4. Executive / SLT will:

- Set tone and role model expected behaviours
- Sponsor qualification compliance plan where applicable
- Ensure resources and prioritisation for mandatory and role-critical training
- Ensure that learning and development activity is aligned to organisational priorities and supported by sufficient capacity, with clear decisions made where trade-offs are required to avoid overloading teams or compromising service delivery

13. Legal / Regulatory Links

13.1. The following is a list of relevant legislation to this policy:

- Competence & Conduct Standard
- Tenancy, Influence & Accountability Standard
- Employment Rights Act (1996)
- Equality Act (2010)
- Health and Safety at Work etc. Act (1974)
- Management of Health and Safety at Work Regulations (1999)
- NHF Code of Conduct (2026)

14. Equality, Diversity and Inclusion

14.1. Salix Homes is committed to promoting and embedding a culture of equality, diversity and inclusion (EDI) within our workplaces and the communities we serve.

- Equality is about ensuring that every individual has an opportunity to make the most of their lives and talents;
- Diversity is recognising difference and responding positively to those differences;
- Inclusion is about creating an environment where our services and employment opportunities are accessible to all.

14.2. We are committed to meeting our obligations and duties under the Equality Act 2010 and to promoting equal opportunities both in the provision of services and in our employment practices. We will consider all the protected characteristics of the Act which are:

- Age
- Disability
- Gender reassignment
- Marriage and civil partnership
- Race
- Religion or belief
- Sex
- Sexual orientation
- Pregnancy and maternity

14.3. We also recognise that Socio-economic background is an area where inequalities exist and commit to addressing this disadvantage and inequality in our communities where able to do so.

14.4. We are also mindful of our duties under the Public Sector Equality Duty, which is to:

- Eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under the Equality Act 2010;
- Advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it; and
- Foster good relations between persons who share a relevant protected characteristic and persons who do not share it.

14.5. Where reasonable to do so, Salix Homes will make any reasonable adjustment to ensure compliance with the Act.

14.6. We will ensure this P&D process is inclusive by:

- Offering alternative formats and accessible tools
- Providing reasonable adjustments for disability/health conditions
- Training managers to reduce bias and improve consistency
- Ensuring development opportunities (including secondments) are offered transparently

15. Related Documents

15.1. The following is a list of related policies, procedures, and documents that may relate to this policy (not exhaustive):

- Behavioural Framework
- Capability Policy
- Code of Conduct
- Decision-making criteria to identify in-scope roles
- Disciplinary Policy
- Mandatory Training Matrix
- Performance and Development Form (to be system-based)
- Performance and Development Procedure
- Probation Policy
- Procedure for colleagues who fail to attain the required qualification
- Qualification Compliance Plan
- Recruitment and Selection Policy
- Register of in-scope roles
- Request for Study or Training Policy