

Competence and conduct policy	
Policy owner: Director of people	Policy ref: HR-PL-001
Date approved: August 2026	Review date: August 2027

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1.0 Purpose

- 1.1 Beyond Housing is committed to delivering safe, high-quality, person-centred services to customers.
- 1.2 This policy sets out our approach to ensuring that all colleagues demonstrate the skills, knowledge, experience and behaviours necessary to deliver services of a consistently good standard.
- 1.3 It establishes our framework for:
 - 1.3.1 Developing and maintaining professional competence.
 - 1.3.2 Embedding clear standards of conduct.
 - 1.3.3 Managing performance fairly and consistently.
 - 1.3.4 Complying with the Competence and Conduct Standard (effective October 2026)
 - 1.3.5 Supporting delivery of the Beyond Housing strategy and Consumer Standards.
- 1.4 Competence and conduct are fundamental to maintaining customer trust, regulatory compliance, and organisational effectiveness.

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2.0 Scope

- 2.1 This policy applies to all colleagues employed by Beyond Housing.
- 2.2 Where services are delivered by contractors, agency workers or labour only contractors, Beyond Housing will seek assurance through contractual arrangements that equivalent standards are met.

3.0 Definitions

- 3.1 **The company** – Beyond Housing and all subsidiaries.
- 3.2 **Manager** – Any employee with responsibility for line management of other employees or workers. This is usually indicated in an employee's job description.
- 3.3 **Colleague** – Anyone with a direct contract of employment with us. This does not include contractors or agency workers.
- 3.4 **Colleague Health Safety and Wellbeing Group (CHSWG)** – A panel comprising functional experts representing all relevant disciplines within the business who meet regularly to examine and monitor training compliance.
- 3.5 **Relevant person** – Someone in a role that falls within the legal requirement to hold or be working towards a relevant qualification in housing management as defined by the government competence and conduct standard.
- 3.6 **FREDIE** – Fairness, respect, equality, diversity, inclusion and engagement.

4.0 Responsibilities

- 4.1 **Board** – Approves this policy and receives assurance on compliance via the governance and review committee.
- 4.2 **Executive team** – Accountable for organisational compliance and embedding professionalism.

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- 4.3 **Director of people** – Responsible for implementation, monitoring and review of the policy and underpinning procedures.
- 4.4 **Managers** – Support and monitor colleague competence and performance, apply the company appraisal scheme, provide regular feedback on performance to their direct reports, encourage them to be proactive about their development and performance.
- 4.5 **Colleagues** – Maintain competence and demonstrate behaviours aligned to values and Code of Conduct. Take ownership of their professional development. Identify and proactively engage with appropriate learning and development activity to develop and maintain skills and knowledge. Apply learning to their work to deliver work to a high standard at all times and improve services delivered to customers.
- 4.6 **Contractors and service providers** – Required through contractual mechanisms to meet equivalent standards where applicable.
- 4.7 **Procurement manager** - Ensuring adequate provisions within procurement processes to ensure contractors and service providers meet equivalent standards as in 1.3 and 4.6.
- 4.8 The **organisation development manager** is responsible for providing guidance and advice on the learning and development aspects of this policy and underpinning training procedures to managers and colleagues. They will commission the design and delivery of cost effective, appropriate training solutions to meet defined learning needs throughout the business while ensuring the identified needs link to our strategic aims.
- 4.9 **HR team** - Responsible for providing guidance and advice on the policy and its underpinning procedures.

5.0 Legislative and statutory requirements

- 5.1 The Employment Rights Act 1996 (ERA 1996) sets out colleague rights during performance management, particularly around capability and dismissal.
- 5.2 The Employment Relations Act 1999 gives colleagues the right to be accompanied by a trade union representative or a colleague in grievance or disciplinary hearings.

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- 5.3 The Equality Act 2010 sets out the requirement to avoid discrimination related to protected characteristics, including the need to consider reasonable adjustments during performance management processes.
- 5.4 ACAS Code of Practice on Disciplinary and Grievance Procedures sets out minimum standards of fairness when handling performance issues, disciplinary action and dismissal.
- 5.5 The Competence and Conduct Standards in Social Housing take effect from October 2026 and requires registered providers to:
- 5.5.1 Secure that colleagues who are ‘relevant individuals’ (including those in service providers) have the necessary skills, knowledge and experience, and exhibit the behaviours needed, for the relevant services provided by those individuals to be of a good quality.
 - 5.5.2 Have a written policy setting out their approach to a number of things such as learning and development, appraising colleagues, and managing poor performance.
 - 5.5.3 Adopt or develop an appropriate code of conduct for those of their staff who are relevant individuals and to ensure this is embedded within their organisation.
 - 5.5.4 Give customers meaningful opportunities to influence and scrutinise the development of the policy, and decisions relating to the code of conduct, and ensure they are made accessible to customers and kept up to date and fit for purpose.
 - 5.5.5 Comply with the qualification requirements: that their senior housing executives and senior housing managers (including those in service providers) have, or are working towards, a specified qualification in housing management.

6.0 Policy detail

- 6.1 Beyond Housing recognises that competence and conduct are not solely matters of compliance, but fundamental enablers of service quality, customer trust and organisational performance.
- 6.2 The following principles underpin our approach:

Professional competence

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6.3 We believe that professional competence is essential to delivering safe, effective and person-centred services.

6.4 We will:

6.4.1 Develop and continuously review a company-wide competence framework that clearly defines the knowledge, skills, behaviours and professional standards required across roles. We will commence roll out of this initially in 2026/27 with housing and other customer facing colleagues, aiming to have a company-wide framework in place by 2030.

6.4.2 Align role expectations to regulatory standards, statutory obligations and strategic objectives.

6.4.3 Ensure colleagues have the opportunity to be appropriately qualified, skilled and supported to meet the requirements of their roles.

6.4.4 Require 'relevant persons' to obtain, or be working towards, mandated housing qualifications within prescribed timescales, in line with the Competence and Conduct Standard within the Transparency, Influence and Accountability standard.

6.4.5 Monitor qualification compliance and report progress through governance structures to provide assurance to executive and board.

6.4.6 Use competence data and insight to identify organisational capability gaps and inform workforce planning.

Learning and development

6.5 We are committed to fostering a culture of continuous learning and professional growth.

6.6 We will:

6.6.1 Provide structured learning and development opportunities aligned to business needs (including succession), strategic aims, regulatory requirements and individual development plans.

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- 6.6.2 Ensure all colleagues complete essential training relevant to their role, particularly in relation to health and safety, FREDIE, safeguarding, and customer interaction in a timely manner.
- 6.6.3 Promote continuous professional development, reflective practice and knowledge sharing.
- 6.6.4 Evaluate the effectiveness of learning interventions to ensure they lead to measurable improvement in performance and service quality.
- 6.6.5 Maintain accurate and auditable records of training and professional development activity.
- 6.6.6 Apply FREDIE principles to ensure equitable access to development opportunities.
- 6.6.7 Promote a culture of personal accountability and ownership of performance and professional development.
- 6.6.8 Ensure learning and development is cost effective.

Performance and accountability

- 6.7 Clear expectations, constructive feedback and fair accountability are central to maintaining high standards.
- 6.8 We will:
 - 6.8.1 Operate a structured appraisal process, linking individual objectives to strategic priorities, service standards and regulatory compliance.
 - 6.8.2 Ensure performance expectations are clear, measurable and aligned to our competence framework and code of conduct.
 - 6.8.3 Address performance concerns promptly, proportionately, fairly and consistently, undertaking informal resolution where appropriate and possible.
 - 6.8.4 Promote early, supportive intervention where improvement is required.

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- 6.8.5 Manage conduct and capability matters in line with employment legislation and recognised best practice.
- 6.8.6 Undertake full and fair investigations in all cases of alleged poor performance or misconduct before decision are made at formal stages.
- 6.8.7 Ensure consistency at all formal stages by involving HR.
- 6.8.8 Ensure strict confidentiality is upheld by all parties involved in performance management processes.
- 6.8.9 Inform colleagues of their right to be accompanied by a trade union representative or colleague at any formal meetings.
- 6.8.10 Apply FREDIE principles to all management of performance.

Conduct and behaviour

- 6.9 Professional conduct underpins customer confidence and organisational integrity.
- 6.10 We will:
 - 6.10.1 Maintain a clear and accessible code of conduct, based on the National Housing Federation code, that sets out expected standards of behaviour and professional integrity.
 - 6.10.2 Embed our organisational values of considerate, accountable, collaborative and ambitious into everyday behaviours and decision making.
 - 6.10.3 Ensure colleagues treat customers, colleagues and partners fairly and with dignity and respect at all times.
 - 6.10.4 Ensure our code of conduct is clearly available on our website, with easy-to-follow instructions on how to tell us if their experience is different.
 - 6.10.5 Provide customers with meaningful opportunities to influence conduct standards, particularly in relation to behaviour in customer homes and community settings.

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6.10.6 Promote a culture where concerns can be raised safely and addressed constructively.

6.11 Compliance with the code of conduct is a condition of employment and forms part of our overall approach to professional standards.

7.0 Underpinning procedures

7.1 The procedures which underpin this policy are:

7.1.1 Appraisal procedure.

7.1.2 Disciplinary procedure.

7.1.3 Capability procedure.

7.1.4 Investigation procedure.

7.1.5 Grievance procedure.

7.1.6 Absence management procedure.

7.1.7 Mediation scheme.

7.1.8 Essential training procedure.

7.1.9 Developmental learning procedure.

7.1.10 Code of conduct, including code when working in customer's homes.

8.0 Controls and reporting

8.1 Performance against the policy will be monitored through monthly HR reports to the executive team and colleague health safety and wellbeing group.

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Control	Line of defence (1st, 2nd or 3rd)	Responsible (job role)	Reported to:
LD0001/002: Training matrix	1st	Organisational development manager	Director of people, executive meeting
SRR0005/012: Monthly operational performance reporting (including qualification compliance monitoring)	1st	Director of people	Executive meeting
SRR0005/013: 5-Year People Plan	1st	Director of people	Executive meeting, governance and review committee
HR0001/002: Annual performance appraisal completion and objective alignment to strategy	1st	Line managers	Executive meeting
CDI0001/0073: Performance metrics included in the business performance review (for customer consultation/scrutiny)	1st	Director of people	Customer scrutiny panel
SRR0005/0014: Competence and conduct: Annual self-assessment (assurance)	2nd	Director of people	Executive meeting, governance and review committee

9.0 Consultation

Consultation with senior leadership team and wider management group	25 February - 25 March 2026
Consultation with colleague forum (local trade union representatives and colleague representatives)	9 -25 March 2026

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Consultation with joint consultation and negotiation committee (local and full-time trade union representatives)	9 - 25 March 2026
Consultation with customers via Customer Sure online survey (with 8% response rate)	8 - 24 April 2026

10.0 Approval and revision

- 10.1 This policy will be subject to review after three years or in response to changes in legislation or good practice, whichever is the sooner.

Accountable:	Chief executive
Responsible:	Director of people
Approval body:	Board

Version	Date	Information
1	August 2026	Creation of a single policy on competence and conduct, incorporating the previous learning and development and performance management policies.