

CLYDESDALE HOUSING ASSOCIATION

Policy	Staff Performance & Learning Policy
Date	26 August 2026
Lead Officer	Chief Executive
Approved By	Management Committee
Review Frequency	Every 3 years or following a significant incident
Regulatory Standards	SHR Standards 3 and 6

Clydesdale Housing Association will provide this policy on request at no cost, in large print, in Braille, in audio or other non-written format, and in a variety of languages.



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1.0 INTRODUCTION

- 1.1 Clydesdale Housing Association recognises that its employees are its most valuable resource. The Association is committed to creating a positive, inclusive and high-performing workplace where employees are supported to develop their skills, achieve their potential and contribute to the successful delivery of organisational objectives.
- 1.2 The purpose of the Staff Performance & Learning Policy is to:
- review and evaluate individual performance, achievement and contribution;
 - support continuous professional and personal learning;
 - agree clear objectives and responsibilities aligned with organisational priorities;
 - identify learning, development and career progression opportunities;
 - promote employee wellbeing, engagement and retention;
 - improve communication between employees and managers;
 - support succession planning and workforce development; and
 - contribute to the successful delivery of the Association's Business Plan and strategic objectives.
- 1.3 The Association regards performance and learning as a continuous process rather than a single annual event. Formal discussions will therefore be supported by regular review meetings and ongoing feedback throughout the year. This will support trust and prevent anxiety that may be experienced through the review processes that are restricted to annual review meetings.

2.0 EQUALITY, DIVERSITY AND INCLUSION

- 2.1 The Association is committed to promoting equality, diversity, inclusion and fairness in all aspects of employment.
- 2.2 The performance and development process will be conducted in accordance with:
- the Equality Act 2010;
 - relevant employment legislation;
 - the Association's Equality and Diversity Policy; and
 - the Association's commitment to creating an inclusive workplace.
- 2.3 No employee will be disadvantaged within the process because of their:
- age;
 - disability;
 - gender reassignment;
 - marriage or civil partnership;
 - pregnancy or maternity;
 - race;

- religion or belief;
 - sex; or
 - sexual orientation.
- 2.4 The Association will make reasonable adjustments where required to ensure employees can participate fully in the process. Adjustments may include alterations to timescales, meeting arrangements, objectives, documentation formats or support arrangements.
- 2.5 All managers involved in the process are expected to apply the policy fairly, consistently and objectively.

3.0 STAFF PERFORMANCE & LEARNING POLICY

3.1 Principles of the Performance & Learning Process (the process)

3.1.1 The process is intended to be supportive, developmental and forward-looking.

3.1.2 The objectives of the process are to:

- establish clear expectations and priorities;
- recognise and celebrate achievements;
- identify opportunities for improvement and learning;
- support employee wellbeing and engagement;
- encourage open and constructive communication;
- align individual performance with organisational objectives; and
- support the development of knowledge, skills and behaviours required by the Association.

3.1.3 The process is a shared responsibility between managers and employees. Employees are expected to actively participate in setting objectives, reviewing progress and identifying their own learning needs.

3.1.4 The process forms part of the Association's wider performance management framework but is distinct from disciplinary, grievance or capability procedures.

3.1.5 Performance concerns requiring formal intervention will be managed through the appropriate employment policies and procedures.

3.2 Employee Needs

3.2.1 Employees should understand:

- who they are accountable to and supported by;
- the responsibilities of their role;
- the standards and behaviours expected of them;
- how their contribution supports organisational objectives;
- how their performance is progressing;
- what opportunities exist for learning and career progression;

- what support may be required to perform effectively; and
- what learning opportunities are available.

3.2.2 The process provides employees with an opportunity to discuss these matters openly and constructively with their line manager.

3.2.3 The Association recognises the importance of maintaining confidentiality and fostering an environment where employees feel able to participate honestly and openly in discussions.

3.3 Organisational Needs

3.3.1 The Association's ability to deliver excellent services depends on the contribution, capability and engagement of its employees.

3.3.2 The process enables the Association to:

- support the achievement of strategic and operational objectives;
- identify workforce learning needs;
- improve organisational performance;
- support succession planning;
- monitor the effectiveness of learning activities;
- strengthen employee engagement and wellbeing; and
- ensure resources are deployed effectively.

3.3.3 Employees are encouraged to contribute ideas and suggestions that may improve service delivery, efficiency and organisational effectiveness.

3.4 Training for Managers and Employees

3.4.1 The Association recognises that an effective process depends upon competent and confident participants.

3.4.2 Appropriate training, guidance and support will therefore be provided to managers responsible for conducting review meetings and to employees participating in the process.

3.4.3 Refresher training will be provided where necessary and following significant policy or personnel changes.

3.5 Employee Wellbeing

3.5.1 The Association recognises the important connection between employee wellbeing, engagement and performance.

3.5.2 Review discussions will include consideration of:

- workload and resource requirements;
- work-life balance;
- physical and mental wellbeing;
- workplace support arrangements;

- reasonable adjustments;
- barriers affecting performance; and
- opportunities to improve employee wellbeing and resilience.

3.5.3 Managers should ensure employees are aware of support mechanisms available through the Association where appropriate.

4.0 THE REVIEW SYSTEM

4.1 Requirements of the System

4.1.1 The review system should support both performance improvement and employee learning.

4.1.2 The system will ensure that each employee understands:

- their responsibilities within the review process;
- the standards and expectations associated with their role;
- their agreed objectives and priorities;
- the support available to help them achieve those objectives;
- how performance will be reviewed; and
- the opportunities available for learning.

4.1.3 Objectives agreed through the review process should normally be SMART:

- Specific;
- Measurable;
- Achievable;
- Relevant; and
- Time-Bound.

4.1.4 Objectives should align with:

- the Business Plan;
- departmental objectives;
- service improvement priorities; and
- individual responsibilities.

4.1.5 Performance discussions should consider both:

- achievement of objectives; and
- demonstration of the Association's values and expected behaviours.

4.1.6 Employees will have the opportunity to express their views and contribute to discussions regarding performance, wellbeing and learning.

4.1.7 A written record of discussions and agreed actions will be maintained and employees will be provided with a copy.

4.2 The Review Process

4.2.1 The review framework consists of:

- an annual formal review meeting;
- quarterly performance and learning review meetings;
- regular informal one-to-one discussions and feedback; and
- ongoing coaching and support where appropriate.

4.2.2 The annual review should provide a comprehensive review of:

- achievements during the year;
- performance against agreed objectives;
- demonstration of organisational values and behaviours;
- wellbeing and workload;
- learning undertaken;
- future learning needs;
- career aspirations; and
- objectives for the forthcoming period.

4.3 The Review Meeting

4.3.1 Employees will normally receive at least two weeks' notice of their annual review meeting.

4.3.2 Prior to the meeting, both parties should review relevant information including:

- job descriptions;
- business and service plans;
- departmental objectives;
- previous review records;
- performance information;
- learning activities undertaken; and
- progress against previously agreed objectives.

4.3.3 Preparation should ensure that discussions are constructive, evidence-based and focused on future learning.

4.4 Review Meeting Records

4.4.1 A Review Form will be completed following the review meeting.

4.4.2 The completed document will record:

- performance achievements;
- agreed objectives;
- learning needs;
- wellbeing considerations;
- support requirements; and
- agreed follow-up actions.

4.4.3 Employees will be given the opportunity to review and comment on review documentation before it is finalised.

4.4.4 Completed records will be signed electronically or physically by both parties.

4.4.5 A copy will be provided to the employee and a copy retained securely within the employee's personnel records.

4.5 Roles and Responsibilities

4.5.1 Review meetings will normally be conducted by the employee's line manager.

4.5.2 The Chief Executive's review meeting will be conducted by at least two Office Bearers.

4.5.3 Managers conducting review meetings are responsible for:

- preparing appropriately;
- conducting meetings professionally and fairly;
- providing constructive feedback;
- supporting employee learning;
- maintaining confidentiality; and
- ensuring agreed actions are followed through.

4.5.4 Employees are responsible for:

- preparing for review discussions;
- participating constructively;
- taking ownership of agreed objectives and learning activities; and
- raising any issues affecting their performance or wellbeing.

4.6 Meeting Environment

4.6.1 Review meetings should be conducted in an environment which:

- supports open and honest discussion;
- minimises interruptions;
- maintains confidentiality; and
- allows sufficient time for meaningful dialogue.

4.6.2 The duration of meetings will vary according to the circumstances and needs of the employee.

4.7 Resolving Disagreements

4.7.1 Where disagreements arise regarding review outcomes, employees should first seek to resolve concerns through discussion with their line manager.

4.7.2 Where concerns remain unresolved, the matter may be referred to:

- the Chief Executive; or
- the Association's Grievance Procedure.

4.7.3 Employees may seek advice and support from their trade union representative at any stage.

4.8 Follow-Up and Continuous Review

4.8.1 Managers are responsible for ensuring agreed actions are monitored and reviewed throughout the year.

4.8.2 Quarterly review meetings should:

- assess progress against objectives;
- discuss any challenges or barriers;
- review wellbeing and support needs;
- update learning plans where required; and
- amend objectives where organisational priorities have changed.

4.8.3 The Association recognises that failure to follow up agreed actions may undermine confidence in the review process.

4.9 Quality Assurance and Monitoring

4.9.1 The Association will periodically review the operation of the review process to ensure:

- consistency of implementation;
- compliance with equality and diversity principles;

- alignment with organisational objectives; and
- effectiveness in supporting employee learning.

4.9.2 Any review will respect employee confidentiality and focus on improving the effectiveness of the system.

4.9.3 A summary report on the operation of the review process may be provided to the Management Committee. Individual employee information will be anonymised wherever appropriate.

5.0 LEARNING

5.1 The Association is committed to supporting employees in developing the knowledge, skills and behaviours required to perform effectively and to prepare for future opportunities.

5.2 Learning needs identified through the review process will inform:

- individual learning plans;
- workforce planning;
- succession planning;
- organisational training programmes; and
- budget planning for employee development.

5.3 The Association will seek to ensure that learning opportunities are allocated fairly and support both organisational and individual needs.

6.0 DATA PROTECTION AND CONFIDENTIALITY

6.1 The Association will process review information in accordance with:

- UK General Data Protection Regulation (UK GDPR);
- Data Protection Act 2018; and
- the Association's Privacy Policy and Records Retention Schedule.

6.2 Review records will be treated as confidential and access will be restricted to authorised individuals with a legitimate business need.

6.3 Personal information obtained through the review process will be:

- processed lawfully, fairly and transparently;
- used only for legitimate employment purposes;
- kept accurate and up to date;
- retained only as long as necessary; and
- stored securely and protected from unauthorised access.

6.4 Employees have rights regarding the personal information held about them, including the right to access and rectify personal data in accordance with applicable legislation.

7.0 REVIEW OF POLICY

7.1 This policy will be reviewed every three years or sooner where:

- legislation changes;
- regulatory requirements change;
- organisational needs require amendment; or
- best practice guidance indicates that revision is necessary.

7.2 The Association is committed to ensuring that its staff performance and learning arrangements remain effective, inclusive, proportionate and aligned with recognised good practice in people management.