



Cloch Housing Association

Performance and Development Policy

Policy Name	Performance and Development
Policy Category	Corporate & Governance
Policy Number	071
Responsibility of	Corporate Services
Approved by	Board
Date Adopted	14 May 2026 (this policy replaced the existing 'Staff Appraisal' policy)
Last Review	N/A
This Review	14 May 2026
Next Review	14 May 2029
Equalities Impact Assessment Required	No
Link to other policies	Performance and Development Procedure Capability Policy and Procedure Organisational Training Policy Cloch Code of Conduct Cloch Business Plan Cloch Values and Behaviour Framework
Consultation	Y (carried out with staff)
Need for Procedure	Y

1. Purpose of the Policy

Cloch Housing Association's success depends on the contribution, capability and wellbeing of our people. Delivering high-quality services to tenants and customers requires team members to perform their roles effectively, demonstrate behaviours aligned with our values and remain focused on continuous improvement.

The purpose of this policy is to set out Cloch's approach to Performance and Development. It explains how expectations and objectives are agreed, how performance is supported and reviewed on an ongoing basis, and how learning and development are embedded into everyday working life. The policy also outlines how team members are supported to take ownership of their development, with appropriate guidance, challenge and support from their managers.

This framework recognises that performance and development are closely linked. Team members are accountable for the objectives they agree and for delivering work to the standards required by the organisation. Managers are responsible for providing clarity, feedback and support, and for addressing performance concerns promptly and fairly. By addressing performance and development together, Cloch seeks to enable consistent, effective contribution and sustainable capability across the organisation.

2. Scope of the Policy

This policy applies to all Cloch Housing Association team members, regardless of role, grade, working pattern or length of service. This includes colleagues on permanent, temporary and fixed-term contracts, trainees and those undertaking work placements.

The principles set out in this policy apply throughout a team member's time with Cloch, including during induction and any probationary period, and support performance and development conversations from induction through to ongoing employment, role changes and evolving responsibilities. The framework is designed to be flexible and proportionate, recognising that roles, responsibilities and development needs will differ across the organisation.

Performance and development conversations apply equally to team members who are new in role, established in their position, developing additional responsibilities or exploring future opportunities. While this policy promotes consistency across Cloch, it also allows managers and team members to tailor conversations to reflect individual roles, circumstances and aspirations.

This policy should be read alongside the Capability Policy, which sets out the formal process to be followed where performance concerns have not improved despite appropriate support. Guidance on learning and development is embedded within this policy and supported through practical tools, including the Personal Growth Plan.

Where a concern relates to conduct rather than capability or development, this policy does not replace Cloch's disciplinary or grievance procedures.

3. Our Approach to Performance and Development

Cloch adopts a continuous, people-centred approach to performance and development. Rather than relying on infrequent or isolated reviews, we prioritise regular, meaningful conversations between team members and managers throughout the year.

These conversations focus on progress against agreed objectives, clarity of expectations, quality and consistency of work delivered, behaviours demonstrated and any support or development required. Development activity is intended to support team members to perform effectively in their role and build capability over time. It does not remove the expectation that role requirements and performance standards are met.

Performance and development are a shared responsibility. Team members are expected to engage proactively, take ownership of their contribution and raise challenges early. Managers are expected to provide direction, feedback and appropriate challenge, and to intervene promptly where performance does not meet the required standard.

4. Definitions

Performance

Performance refers to how a team member carries out the duties of their role, including the quality, consistency and timeliness of work delivered, progress against agreed objectives and behaviours aligned with Cloch's values.

Development

Development refers to the ongoing process of building skills, confidence, knowledge and experience to support effective performance now and in the future.

Capability

Capability refers to a team member's ability to perform their role to the required standard. It relates to factors such as skills, knowledge, experience, aptitude or health, rather than conduct or behaviour. Where concerns about capability do not improve despite appropriate support through performance and development conversations, these may be addressed under Cloch's Capability Policy.

Objective Setting

Annual objective setting is a structured conversation, normally held once per year, where managers and team members agree clear objectives in line with organisational priorities and discuss development needs to support effective delivery.

5. Responsibilities

Team members

Team members are responsible for their own performance and development. This includes:

- performing their role to the required standard and delivering agreed objectives
- engaging openly and honestly in performance and development conversations
- preparing for and participating fully in annual objective setting and regular check-ins
- demonstrating behaviours aligned with Cloch's values
- taking ownership of their learning and development, using feedback constructively
- raising concerns, challenges or support needs at an early stage

Managers

Managers are responsible for creating the conditions for strong performance and development. This includes:

- setting clear expectations and agreeing objectives aligned to organisational priorities

- providing regular, balanced and constructive feedback
- recognising contribution and positive performance
- supporting team members to build capability through development, guidance and challenge
- ensuring performance and development conversations are timely, prepared and meaningful
- addressing performance concerns promptly and fairly
- taking appropriate action in line with this policy and, where necessary, the Capability Policy
- applying this framework consistently and in line with Cloch's values

6. Performance, Development and Objective Setting Framework

Cloch's performance and development framework brings together annual objective setting, ongoing feedback, learning and recognition into a single, joined-up approach.

Each year, managers and team members will hold an annual objective setting conversation to agree clear objectives aligned with Cloch's strategic priorities. These objectives provide clarity of expectation and form the basis for performance conversations throughout the year. Objectives may be reviewed and adjusted where organisational priorities or circumstances change.

Alongside objective setting, managers and team members will hold regular check-in conversations to review progress, discuss workload, wellbeing, and to identify development needs. These conversations ensure performance remains visible, supported and appropriately managed.

Learning and development discussions are integrated into this framework and focus on building the capability required to deliver objectives effectively, both now and in the future.

7. Ownership of Learning and Personal Growth

Cloch believes development is most effective when our people take an active role in shaping their own growth, supported by their manager.

Team members are encouraged to reflect on what motivates them, where they wish to build capability and what experiences may support their development

over time. Managers support this through guidance, feedback, constructive challenge and enabling access to development opportunities where reasonably practicable.

To support this approach, Cloch encourages the use of a Personal Growth Plan. This is a flexible, team-member-owned tool that supports reflection, learning and development discussions. It complements objective setting and does not replace accountability for performance output or role requirements.

8. Recognition and Reward

Cloch recognises that strong performance, positive contribution and behaviours aligned with our values should be acknowledged and appreciated. Recognition plays an important role in supporting engagement, motivation and a positive working culture, and forms an integral part of our performance and development approach.

Recognition at Cloch is part of everyday working life rather than a one-off or annual exercise. Managers are expected to acknowledge good performance and contribution regularly through timely, meaningful feedback. This includes recognising achievement against objectives, effort and improvement, and behaviours that reflect how Cloch expects work to be delivered.

Within this policy, reward refers primarily to non-contractual recognition such as development opportunities, increased responsibility, trust and autonomy, rather than financial incentive. That recognition may take a variety of forms, including verbal or written feedback, acknowledgement within teams, sharing positive feedback from customers or colleagues, or providing opportunities for team members to contribute to or lead work aligned to their strengths and interests. Recognition approaches may evolve over time to reflect organisational priorities and available initiatives.

Cloch also recognises performance through trust, autonomy and development opportunities. Where appropriate, team members who demonstrate strong and sustained performance may be supported with opportunities such as project involvement, exposure to different areas of the organisation, mentoring, shadowing or learning activity to support their growth and future contribution.

9. Supporting Performance Where There Are Concerns

Where concerns about performance arise, these will be raised promptly through open and constructive discussion. The focus will be on clarifying expectations, understanding contributing factors and agreeing appropriate support and timescales for improvement.

Where performance does not improve despite reasonable support and opportunity, matters may be managed under Cloch's Capability Policy, which sets out the formal process to be followed.

10. Fairness, Equality and Consistency

Cloch is committed to ensuring performance and development arrangements are fair, inclusive and consistently applied. Individual circumstances will be considered, and reasonable adjustments made where appropriate, in line with equality legislation and Cloch's values.

11. Review

This policy will be reviewed at least every three years, or sooner if required due to organisational, legislative or best practice change.