

Competence and Conduct Standard Policy

Version 1.0

September 2026



1. Introduction

- 1.1 This Competence and Conduct Standard Policy is developed for and applies to heylo (“the Company”).
- 1.2 For the purposes of this policy, heylo refers to ResiManagement Ltd, heylo Housing Group Ltd, heylo Housing Registered Provider and any affiliated heylo entities involved in the provision or support of landlord services and any third parties undertaking regulated landlord services on behalf of heylo Housing.
- 1.3 This policy aligns with the Regulator of Social Housing’s Competence and Conduct Standard and aims to:
 - (a) Ensure that relevant staff have the necessary skills, knowledge and experience, and exhibit the behaviours needed, for landlord services to be of good quality; and
 - (b) Take appropriate steps to ensure the same standards among relevant staff employed by service providers delivering landlord services on their behalf.
- 1.4 Specifically, this policy sets out the Company's approach to:
 - (a) Identifying the roles and functions subject to competency and qualification requirements;
 - (b) Assessing and evidencing competence;
 - (c) Learning, development and continuing professional development;
 - (d) Professional qualifications and qualification compliance;
 - (e) Performance and competency reviews;
 - (f) Addressing competency gaps and poor performance;
 - (g) Embedding professional conduct standards; and
 - (h) Securing appropriate competency standards amongst relevant service providers delivering landlord services on the Company's behalf.
- 1.5 The Company will maintain a separate Code of Conduct setting out the standards of professional and ethical behaviour expected of relevant staff.
- 1.6 The Group Head of HR is responsible for maintaining this policy. Managers, senior leaders, relevant staff and those responsible for procuring or managing service providers each have responsibilities for its effective implementation.

2. Scope

- 2.1 This policy applies to Relevant Staff involved in the provision of landlord services.
- 2.2 For the purposes of the Competence and Conduct Standard:
 - (a) Relevant Staff means staff involved in the provision of landlord services;

- (b) Landlord Services means services connected with the management of social housing provided by the registered provider; and
- 2.3 Housing Professional roles or functions means those roles or functions identified by the Company as being subject to specific housing competency and/or statutory qualification requirements.
- 2.4 The Company will identify Relevant Staff and Housing Professional roles by reference to the duties performed, rather than job title or employment status alone. The applicable competency, training and qualification requirements for each role will be recorded within the Competency and Qualification Matrix (CQM).
- 2.5 This policy does not form part of any employee's contract of employment and does not create a contractual entitlement to Company funded training, study leave, professional membership or any other benefit.
- 2.6 The Company may amend this policy to reflect changes in legislation, regulation, regulatory guidance, qualification requirements or business needs.

3. Competence Framework Assessment

- 3.1 The Company will maintain a Competency and Qualification Matrix ("CQM") identifying:
 - (a) The roles and functions classified as Relevant Staff;
 - (b) The skills, knowledge, experience and behaviours required for each role or function;
 - (c) Mandatory training and continuing professional development requirements;
 - (d) Any applicable professional qualification requirements;
 - (e) The evidence required to demonstrate competence
- 3.2 The CQM will distinguish between:
 - (a) Regulated housing competency requirements applying to Relevant Staff;
 - (b) Statutory qualification requirements applying to specified Housing Professional roles.
- 3.3 The Company will conduct an evidence based assessment of Relevant staff undertaking or being considered for HP roles or functions against the CQM requirements:
 - (a) During recruitment and selection;
 - (b) Before assigning an individual to a Relevant Staff or Housing Professional role or function;
 - (c) As part of induction and probation;
 - (d) At least annually through the performance review process; and
 - (e) Whenever there is a material change to the individual's role, responsibilities or applicable regulatory requirements.

- (f) As part of the annual performance review, managers will review the applicable CQM requirements and record whether the employee:
 - (i) Meets the applicable competency requirements;
 - (ii) Meets the requirements subject to identified development needs; or
 - (iii) Does not currently meet the applicable competency requirements.
 - (iv) Where development needs or competency gaps are identified, these must be documented together with agreed actions, support, timescales and a reassessment date.

3.4 Evidence used to assess competence may include:

- (a) Performance against objectives and KPIs;
- (b) One-to-one meetings and annual performance reviews;
- (c) Qualifications, training and continuing professional development;
- (d) Quality assurance and case reviews;
- (e) Observation of work and management supervision;
- (f) Customer feedback and complaints;
- (g) Compliance or audit findings; and
- (h) Evidence of behaviours and conduct.

3.5 The evidence used will be proportionate to the nature of the role, the individual's responsibilities and the level of customer or regulatory risk involved.

3.6 Where an individual does not fully meet all applicable CQM requirements at the point of appointment, the Company will agree a development plan. At the end of probation, managers must confirm that sufficient progress has been made towards achieving the required competency standards. Any outstanding development needs will be monitored through the performance review process and supported through ongoing learning and development activities.

4. Policy Statement

4.1 The Housing Professional roles and functions subject to specific competency and/or qualification requirements are set out below and in the CQM. The Company will review the classification of roles regularly and whenever roles or responsibilities materially change.

Coverage	HP Role/Function	Minimum Qualification Requirement	Competency Requirements (as detailed in the CQM)	Conduct Compliance
Two members of the Executive Committee	Chief Officer	Foundation Degree or Ofqual-regulated Level 5 Housing Qualification or approved equivalent	Yes	Yes

	Senior Housing Executive	Foundation Degree or Ofqual-regulated Level 5 Housing Qualification or approved equivalent	Yes	Yes
All Senior Leaders of Property Management Staff	Property Management Head of Service	Ofqual-regulated Level 4 Housing Qualification or approved equivalent	Yes	Yes
			Yes	Yes
All Leaders of Property Management Staff	Property Management Team Leader or Senior Manager	Ofqual-regulated Level 3 Housing Qualification or approved equivalent	Yes	Yes
All Property Management Staff	Various	N/A	Yes	Yes
All Other Staff	Various	N/A	N/A	Yes

- 4.2 Employees required to undertake a professional qualification will have an agreed learning plan setting out the applicable qualification, target completion date, milestones, study arrangements and review dates.
- 4.3 Unless otherwise agreed, Company-supported qualifications should normally be completed within 18 months of commencement, subject to the duration and requirements of the relevant qualification.
- 4.4 Employees must meet the qualification requirements applicable to their role within the relevant statutory or regulatory timescale, including any applicable transitional, exemption or “working towards” arrangements
- 4.5 Employees appointed to a Housing Professional (HP) role who do not already hold the qualification required for their role must be enrolled on, and actively working towards, the relevant qualification within 12 months of commencing employment or being appointed to the role.
- 4.6 Progress towards qualification completion will be reviewed through supervision meetings, one-to-one meetings and annual performance reviews.

5. Learning and Development

- 5.1 Relevant Staff must also maintain and demonstrate the up-to-date skills, knowledge, experience and behaviours applicable to their landlord service responsibilities.
- 5.2 Learning and development plans for Relevant Staff will take account of the requirements identified in the CQM and any gaps arising from competency assessments.
- 5.3 Learning and development will generally follow a 70:20:10 approach:
- (a) 70% through practical experience.
 - (b) 20% through internal learning, coaching and mentoring.
 - (c) 10% through external courses, qualifications and professional development activities.

- 5.4 Development needs will be identified through annual performance reviews, one-to-one meetings, probation reviews, and regulatory requirements.
- 5.5 The Company may support learning through:
 - (a) Professional qualifications;
 - (b) Mandatory training;
 - (c) Skillcast learning;
 - (d) Mentoring and coaching;
 - (e) Webinars and workshops;
 - (f) Conferences and seminars; and
 - (g) Professional memberships.

6. Personal Development Plan

- 6.1 The Company operates an annual performance review process through Cezanne.
- 6.2 As part of this process, employees and managers will agree appropriate objectives and development actions.
- 6.3 For Relevant Staff, the review will include an assessment against the applicable CQM requirements. Any competency gaps, qualification milestones or continuing professional development requirements will be recorded within the employee's Personal Development Plan or associated competency record.
- 6.4 Personal Development Plans may include:
 - (a) Professional qualifications and milestones;
 - (b) Continuing professional development;
 - (c) Technical or regulatory learning;
 - (d) Leadership development;
 - (e) Mandatory training;
 - (f) Enhanced supervision or quality assurance; and
 - (g) A date for reassessment where a competency gap has been identified.

7. Study Support

- 7.1 Subject to operational requirements and prior approval, the Company may provide support including:
 - (a) course fees;

- (b) examination fees;
- (c) professional membership fees;
- (d) learning materials;
- (e) mentoring and coaching; and
- (f) study leave.

- 7.2 Employees undertaking approved professional qualifications may be granted up to 5 working days' paid study leave per annum, subject to operational requirements and prior manager approval.
- 7.3 Study leave must be approved in advance by the employee's manager and recorded in Cezanne as training leave.

8. Training Cost Repayment

- 8.1 Where the Company funds a qualification or external development activity, employees may be required to enter into a separate written learning agreement.
- 8.2 Subject to the terms of that agreement, employees may be required to repay training costs if their employment ends within the following periods:

Period from Date Final Cost Incurred	Repayment Required
0-12 months	100%
12-18 months	50%
18-24 months	25%
More than 24 months	0

- 8.3 The Company reserves the right to waive repayment requirements where appropriate.

9. Mandatory Training and Code of Conduct

- 9.1 All relevant staff must complete mandatory training required for their role and must also complete any additional regulatory, technical, conduct or continuing professional development requirements identified in the CQM.
- 9.2 Mandatory training may include regulatory, compliance, health and safety, safeguarding, conduct and other role-specific learning requirements.
- 9.3 Relevant Staff must also complete any additional regulatory, technical, conduct or continuing professional development requirements identified in the CQM.
- 9.4 Compliance with the Code of Conduct will be considered as part of the assessment of how an employee performs their role. For Relevant Staff, this will also form part of the evidence used to assess compliance with applicable regulatory conduct requirements.

- 9.5 Failure to complete mandatory training, meet conduct expectations or complete required attestation may result in management action under the relevant Company process.

10. Performance Review and Competency Concerns

- 10.1 The Company will regularly review the performance and competence of relevant staff, against the competency requirements applicable to their role as set out in the CQM
- 10.2 Reviews will consider:
- (a) Achievement of objectives / KPIs;
 - (b) Quality of work;
 - (c) Customer outcomes;
 - (d) Technical competence;
 - (e) Compliance;
 - (f) Behaviours and conduct;
 - (g) Learning and development progress; and
 - (h) Progress towards required qualifications.
- 10.3 Where performance concerns arise, managers will seek to address concerns promptly through coaching, support, training and development.
- 10.4 Where a Relevant Staff member is assessed as not meeting an applicable competency requirement, the Company may introduce proportionate measures to manage customer, operational or regulatory risk. These may include:
- (a) Enhanced supervision or quality assurance;
 - (b) A structured Performance Improvement Plan;
 - (c) Temporary restriction of specified duties or decisions;
- 10.5 Any measures will be based on the nature and seriousness of the identified gap and will be reviewed regularly. The employee will be informed of the concern, the required improvement, the support available and the arrangements for reassessment.
- 10.6 Where sufficient improvement is not achieved, the matter may be managed under the Company's disciplinary procedures.

11. Service Providers

- 11.1 The Company will take appropriate steps to ensure that relevant staff employed by service providers delivering landlord services on its behalf have the skills, knowledge, experience and behaviours required to deliver high-quality services.

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- 11.2 This may include contractual requirements, due diligence, audits and third-party reporting requirements including performance and competency reviews.

12. Tenant Scrutiny and Review

- 12.1 This policy and the Company's Code of Conduct will be kept up to date, fit for purpose and accessible to tenants.
- 12.2 Tenants will be given meaningful opportunities to influence and scrutinise the development and review of this policy and the Code of Conduct.
- 12.3 This policy will be reviewed annually or sooner where required by legislative, regulatory or organisational change.

Version Control

Version	Date	Author	Verifier	Comments
1.0	September 2026	Group Head of HR	HHRP	New Policy
Next review due: September 2028				



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accommodate your needs.

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The Registered Office of each of the group companies is:
One Sovereign Quay, Leeds, LS1 4AG.

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