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Institute of  
Housing  
Scotland

# Succession planning in Scotland's social housing sector

June 2021

## Introduction

Scotland's social rented sector manages around 600,000 homes and employs tens of thousands of practitioners to help manage these homes and support their tenants. The vast majority of landlords and staff across both tenures engage well with their residents and listen to them with respect.

The recent publication of *Housing to 2040* makes it clear there will be increasing expectations on landlords, letting agents and housing practitioners to deliver even more value for tenants in the services they provide over the coming years. As such, there is a responsibility on employers to ensure they have a skilled, knowledgeable and ethical workforce that can improve housing outcomes for their communities.

A principal component of this is approaches to staff recruitment, development and retention. How can housing organisations ensure they are employing candidates with the values, the skills and the behaviours that they need? What needs to be done to progress the learning and development of these candidates when they are in post? How do they recruit the right talent?

This guide aims to support Scotland's housing organisations in thinking more about their own succession planning, highlighting some of the best practice across the country in developing and retaining housing talent and providing resources to improve processes.

## What do we mean by succession planning in the housing sector?

Anecdotal information suggests there are a number of senior leaders leaving the Scottish housing sector over the next few years and as such, succession planning is in part about identifying and growing talent to fill leadership and business-critical positions in the future.

Housing organisations want to be able to fill key roles quickly and efficiently when someone leaves, and succession planning gives a business confidence that there are protocols in place to attract new candidates from within and outwith the organisation. But this should not be limited to senior roles. Succession planning also considers talent development and bringing in people in the early stages of their housing career with the intention of developing them for more senior roles in the future.

A comprehensive succession planning protocol should always go beyond the recruitment of candidates. It will also consider their training and development needs so that they can be well placed to apply when a vacancy arises.

Finally, an effective succession planning process can also support housing organisations to address wider equality, diversity and inclusion objectives to better ensure their workforce is representative of their tenant base.

## How can succession planning support housing management?

In 2014, CIH published the research report *Frontline Futures – new era, changing roles* for housing officers, which highlighted trends and changes in frontline housing roles in the social housing sector. It suggested that, in future, roles were likely to be:

- **Differentiated**, using data intelligence to guide how officer time is used.
- **Relational**, doing things with residents not to and for them.
- **Interactive**, working with professionals from other disciplines to achieve a broader range of outcomes for residents.
- **Varied and creative** in the way that they find solutions.
- **Engaged and impactful** aiming to have a positive impact on people's lives and the organisation's bottom line.
- **Novel and anticipatory**, doing something now to avoid later negative consequences.

The research also identified that process would become less important with greater focus on outcomes instead, and that people at the frontline would be increasingly filling gaps left by the withdrawal of other services, bringing new skills of resilience, creativity and adaptability to the fore.

By focusing on the values of the candidates and the development of generic skills, organisations can develop pools of talented people, each one of whom is adaptable and capable of filling a variety of roles. This can give the organisation and the individual flexibility about future positions that may become available.

Succession planning for senior roles should not be left until there is a vacancy. Where possible, organisations should look to develop internal candidates that could apply for roles by giving people appropriate development opportunities, although not at the exclusion of considering external applicants.



## Key questions to consider when developing succession planning protocols

### Why should I care about succession planning?

Succession planning is a critical business component. By having protocols that ensure you are recruiting the right type of candidate for your organisation, you will give your board/committee/regulator the confidence that you will not be unduly affected by staffing changes. When combined with a person specific training and development programme, you are ensuring you are getting the best out of your existing post-holders and you are giving them the best possible opportunity to apply for future vacancies. A commitment to staff training and development should still require a competitive recruitment process for future opportunities.

### What posts should be covered by succession planning?

All posts. Traditionally succession planning may be focused on senior roles within an organisation but where possible, an organisation's approach to succession planning should be broader than this. It should consider how all recruited positions can ask for specific skills and values and in turn support a candidate in their career development. A succession planning process should consider early career and emerging talent roles to ensure the organisation has the right values and skills throughout.

### How can succession planning address or support corporate objectives on equality, diversity and inclusion (EDI)?

Many housing organisations in Scotland struggle to address demographic and socio-economic underrepresentation in their workforce. However, developing an EDI-centric approach to succession planning could involve working with organisations like PATH Scotland, ENABLE, the Housing Diversity Network, CIH Futures, your tenants and local colleges and universities to ensure that those that are traditionally underrepresented in the application process have an opportunity to put themselves forward for a job.

### Do I need to work with outside agencies or organisations to develop an effective succession planning process?

Each organisation will want to consider how it can attract a sufficient pool of candidates to express interest in applying for a role. If current approaches do not provide candidates that meet your applicant specification with regards to protected characteristics, educational attainment or values, then working with partner organisations can help you. It is important to understand how and where potential candidates might search for jobs and to then work with relevant partners, community agencies and broader networks to reach people who might not otherwise have considered working for a housing organisation. Where you advertise can be as important as what roles you advertise.



## What should we consider to improve staff learning and professional development after the recruitment process has concluded?

Recruitment is just one part of succession planning and the focus on continual professional development of your new recruits when in post is crucial, so they can step up in the future. This may include housing qualifications, relevant training, coaching and mentoring. The CIH new [professional standards](#) can help individuals and organisations to identify training and development needs.

For some letting agency staff (including social landlords that carry out letting agency work) it is [mandatory to have a relevant qualification](#) of (or equivalent to) SQF Level 6 or above, such as [LETWELL](#) offered by Landlord Accreditation Scotland. They will also need to demonstrate continuous professional development.

## We are a very small organisation and don't have the capacity or need for succession planning.

Succession planning is about getting the right candidate for the right post at the right time. It need not be onerous but investing the time in your recruitment will mean that when vacancies do arise, you get the best possible candidate for the post. By focussing on succession planning, you can find out the career intentions of your staff and put in place protocols that will help you recruit correctly or help people step up when the time comes. This could help to reduce staff turnover and the need for time consuming recruitment processes.

## Are there risks associated with developing internal candidates?

Internal candidates can be the best people for a role, including senior roles, but it is vital that there is an independent process in place that ensures (a) they are competing fairly and equally against external candidates and (b) the current postholder does not create any conflict of interest in the recruitment decision. Ignoring either of these considerations may undermine board/committee/regulator assurance in your organisation.



## Learning from others

### Kingdom Housing Association's Graduate Trainee Programme

Kingdom Housing Association's graduate scheme lasts for three years, during which time trainees complete tailored placements within Kingdom as well as completing external work placements with key stakeholder organisations. Kingdom Housing Association has developed a partnership with the University of Stirling to support its graduate trainee programme. The aim is to provide a holistic learning experience, supporting graduates to develop into housing professionals and leaders for the future through a blend of practical work experience, including external work placements, underpinned by postgraduate study through the University of Stirling.

This model allows candidates to participate in further academic learning whilst also working in housing. Specifically, it has allowed the opportunity for those already working in housing to receive extra training and develop research skills, and will now allow new students without a practical background in housing the opportunity of real, hands-on experience over the course of their Housing Studies diploma.

### Fife Council's Training Academy

In 2019, Fife Council launched a Housing Training Academy committing to an annual intake of young people, giving staff and trainees the opportunity to gain nationally recognised housing qualifications. Following approval from the SCQA, the council is an approved training base for the delivery of Housing SVQ 2 / 3 and 4 courses. The aim is to support career progression and succession planning through coaching, mentoring, training, support and qualifications.

The programme is open to members of staff across the sector and will support officers and managers in a leadership programme and over time build detailed progression routes for employees in frontline service roles. Participants are expected to commit to the programme for a period of two years.

### PATH Scotland

PATH helps to address the absence of people from black and minority ethnic (BME) communities working within the housing sector. PATH works alongside social landlords to develop specialist three-year traineeships which combine a structured work programme with a professional qualification. These traineeships are tailored to the needs of the organisation. Opportunities are advertised through the promotion of past successes and although full-time employment is not guaranteed, 90 per cent of trainees have gained employment in housing or related sectors post-placement. Between 2009-2017, PATH provided approximately 126 housing traineeships to people from BME backgrounds.

### Port of Leith Housing Association

In producing personal training and development plans, managers and senior managers have frank discussions with those that they manage about their career aspirations and their intentions as to how long they intend to stay in their post. When a staff member indicates an interest in a more senior position, they will be placed on the succession plan for that position and discussions about their personal development will include what support they will require in order to be considered a strong candidate. This ensures that, when a postholder leaves, an internal candidate has the best possible chance to succeed, although the post will be open to external candidates as well.



## Shetland Islands Council

Recognising the different challenges in more rural and remote areas, Shetland Islands Council supports a career-graded structure which develops and professionalises their housing management team. The Council uses formal CIH qualifications through distance-learning alongside on the job skills, knowledge and experience to 'grow their own' housing workforce.

## Easthall Park Housing Association

Easthall Park has a well-established culture of supporting staff development. All staff members are encouraged to reflect on their own career and take on more leadership/senior opportunities and increase their visibility in the organisation. Staff are supported to volunteer, take on greater responsibilities, and develop their skills ahead of any senior position becoming available. This ensures that they would have the best possible chance to succeed in the post in the future. When recently appointing a new director, they purposely used an external recruitment agency to ensure that the process was fair and transparent for all candidates.

## Osprey Housing Association

Osprey is setting up its own Academy to help develop its own team and help the emergence of the next generation of sector leaders. Recognising its flat management structure means opportunities for career path promotion can be limited, the Academy approach will support shared leadership across the company and individual personal development. Opportunities available through the academy include job rotations, secondments, qualifications, apprenticeships and project leadership. The academy will be open to all staff at Osprey who want to develop their own career. It is hoped that over time the Academy will support increased workforce diversity at Osprey.



## Top tips for succession planning

We asked housing organisations for their top tips for undertaking a succession planning process.

1. Use your annual appraisal processes wisely. This can help you better understand future staffing needs with regard to key positions, who may be leaving and where there is the potential to develop people for promotion and more senior posts.
2. Use your recruitment planning process to address under-representation in your organisation. Having a diverse workforce is good for business.
3. When recruiting for new talent, think about where you are recruiting. Trade websites may be useful for certain roles, but will you reach the range of applicants you want? How can you use social networking channels and trusted intermediaries?
4. When looking to develop staff, use the full range of resources available. Be it housing qualifications from a local college or education and training through the CIH Housing Academy. There are a range of useful resources available that both staff and employers can use to identify development needs (see below).
5. Don't forget your tenants. Not only are they a potential pool of housing talent but your business will benefit from having staff who have experience of living in your homes.
6. Test the market and be mindful of conflicts for senior appointments. It is great to give internal candidates an opportunity, but it is important there is as wide a pool as possible and that the recruitment process is open and transparent and fair and equal to all.
7. You may want to use a recruitment consultant to ensure impartiality as well as helping to identify candidates for interview. If so, it is important that any consultancy you use understands the housing sector, your organisation and its values, and the needs of the job role being filled.
8. This is business critical. Developing the right talent should be a core part of your role and give you, your board/committee, and any regulator the confidence that you have the team in place to deal with core housing management responsibilities.

## Succession planning checklist

1. Build a team. Bring together a core group including senior leaders, board members, tenants and HR to consider the organisation's future needs.
2. Create a succession planning policy and consider what are the risks to your organisation? What does your organisation need? How will you address any talent gaps? What budget is required? Do you need to draw on external expertise to do this?
3. Create an internal and external mechanism for succession planning. This will include advertising roles to wider audiences, putting existing staff on talent pathways, reviewing and refreshing your appraisal process and giving existing staff the opportunity to take on more responsibilities and step up. Think about how you could promote housing as a worthwhile career. There could be a huge potential audience with the skills, qualities and values needed who are just not aware of the possibilities.
4. Maintain regular one to ones with staff to nurture talent and ensure development is on track. Complement this with training, support, qualifications, mentoring and coaching as required.
5. Review the outcomes and success of your succession plan as part of your own assurance process and adjust it if needed.
6. Communicate what you are doing to your organisation. A public commitment of your intentions will improve the visibility and effectiveness of your approach.



## Key resources

- CIH Professional Standards and self-assessment tool - objective standards to allow housing professionals to measure their own performance and better identify their development needs, March 2021: <https://www.cih.org/professional-standards>
- CIH's mentoring scheme for members: <https://www.cih.org/why-join-cih/member-benefits/mentoring-scheme>
- CIH, Guide to housing qualifications, May 2021: <https://www.cih.org/media/4sdjo10g/0474-what-housing-qualification-should-i-study-v1.pdf>
- CIH, Guide to learning centres, colleges and universities offering housing qualifications: <https://www.cih.org/education>
- CIH, New Approaches to Housing Management, CIH 2020 <https://www.cih.org/publications/new-approaches-to-housing-management>
- Glasgow West of Scotland Forum, Succession Planning, 2017: <https://gwsf.org.uk/wp-content/uploads/GWSF-Succession-Planning-Report-FV.pdf>
- SFHA senior staff succession guide, February 2021: <https://www.sfha.co.uk/our-work/policy-category/governance-and-regulation/sub-category/governance/policy-article/sfha-senior-staff-succession-planning-guidance---now-available>





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