



ANNUAL REPORT

2022 | 2023



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Vision, Mission and Values

OUR VISION

Deliver and Grow

OUR MISSION

To build and manage safe and comfortable homes that are truly affordable for people who are not in a position to access the housing market.

OUR VALUES

SUPPORTING COLLABORATION

Enabling staff and tenants to work together to achieve shared goals

TRUST AND HONESTY

Being willing to listen and learn and be open when we need to improve

RESPECT AND UNDERSTANDING

All colleagues and residents can expect mutual courtesy and empathy when times are challenging

INTEGRITY AND PROFESSIONALISM

Ensuring at all times that we conduct ourselves in a way that reflects the importance of the service we provide

VERSATILE AND INNOVATIVE

By embracing opportunities and new ways of thinking that will enhance how we deliver

EQUAL AND INCLUSIVE

By celebrating difference and ensuring that we do not operate in a way that excludes anyone

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Chair's Message

In this my final year as Chair of the Board, I am pleased to introduce the annual report as the first of the newly merged Willow Tree Housing Partnership Limited (WTHP).

After nearly three years of working together in a strategic partnership, Tamar Housing and South Western Housing achieved their stated aim of becoming one organisation on 31 March 2023, concluding an intense period of planning and preparation to remove any last impediments to merger.

A concerted collaboration between the Board, the Executive and the wider staff team has resulted in a year closing with a healthy cash position, an operating surplus of over 21% and a strong asset base that provides for a positive future for the organisation. WTHP reported a deficit on total comprehensive income, due largely to the need to align the treasury position prior to merger. This was a one-off event that I am confident will be reversed in the next year, when the forecast is expected to return to a surplus position.

The Board refreshed the mission and values in the past year, maintaining at the core our desire to ensure our tenants live in safe and comfortable homes, and that the staff team can work in an open and positive environment, supporting a culture of empathetic service delivery and active listening to concerns. To that end, performance on complaints and learning from them has improved, support for tenants during a sustained cost of living crisis continued, and the focus on ensuring all homes are safe to live in was maintained. In addition, everyone adopted the National Housing Federation Code of Conduct 2022, providing a shared platform for all involved in the running or scrutinising of the performance of the organisation to operate within; integrity, professionalism, probity and ensuring health and safety and protecting the environment sit at the forefront of all of our work.

Balancing our desire for growth, whilst not losing sight of the critical importance of investing in our existing stock, remains

fundamental to the Board. There will not be a Board in the sector that was not affected by the tragic death of Awaab Ishak. This sobering event saw a reinforced determination to ensure that this never happens to any of our tenants. A wholesale review of our approach to damp and mould was undertaken, increasing staff awareness and the financial provision within the budget to ensure work to remedy any instances is completed swiftly.

This work supports our aim of operating sustainably and I am also pleased to report that this last year saw WTHP replace all oil fired heating systems with new forms of renewable heating. We were also successful in securing just under £200k of grant from the Social Housing Decarbonisation Fund that will support the retrofit of one of our blocks of flats in Plymouth. Matched with our own funding, this enables WTHP to harness best practice and use the insight we gain from our residents' experience, to learn and hone our approach to mitigating our climate impact into the future.

This next year will be equally a time of change and one of consolidation. I know that WTHP will never lose sight of the vision to deliver and grow for the benefit of those for whom choice is limited. I wish the new Chair and all of Willow Tree Housing Partnership every success in the future.

TIM SHOBROOK
CHAIR



WE ARE PROUD OF OUR TRACK RECORD OF DELIVERY IN THE SOUTH WEST. AS THE ECONOMIC ENVIRONMENT POSES CHALLENGES, THE BOARD WILL RESPOND POSITIVELY, ALLOCATE RESOURCES WHERE THEY ARE NEEDED, TO SUPPORT OUR TENANTS AND COLLEAGUES.



CEO's Introduction

2022-23 has been another challenging year for providers of social housing and their tenants, and Willow Tree Housing Partnership (WTHP) continues to respond in a planned and measured way.

Our work in the past year has been rooted in the delivery of services that meet our tenants' needs and deploying finite resources where they are needed most.

Whilst a major focus for the year was consulting on and completing a successful merger, business as usual saw investment in existing homes of just over £600k, which included 37 new bathrooms and 57 new boilers. Two significant projects were completed successfully; the second phase of reinforcing log walls in Okehampton for circa £288k and the installation of a new lift at Holyrood Court in Plymouth for circa £68k. In addition, circa £7k was awarded in community investment and hardship grants to places and people who needed a little extra support; though the sums were relatively small, the impact they have is significant for the individuals concerned and WTHP continues to provide for such circumstances as part of its efforts to alleviate the burden in difficult times.

As part of our aim to continue to improve our listening, we have been grateful this year for the time our tenants have given over to us to support the awarding of a new responsive repairs contract. We would also thank our tenants for their views on the proposed merger, for helping us to produce a person centred approach to damp and mould, for helping us to produce a new website that we hope is easier to use and for residents to communicate with us at any time of the night or day that suits them best.

As we seek to continue to support our aim of providing safe and warm homes for all and to reduce our carbon footprint, we have been focusing on ensuring we have a property portfolio that delivers this. During the year we have disposed of 4 properties that failed to meet our criteria. We are now procuring new homes with the proceeds that offer a higher level of environmental performance, that will enable residents to run them more efficiently and with less repair problems in the

future. This strategy will continue as we move forward to ensure that our homes always remain desirable to live in, for both current and future residents.

Sustainability is not just about climate change, but also supporting people to achieve more autonomy. This year saw another 4 tenants move out of renting into ownership from our rent plus properties and a further 2 increase their asset share in their shared ownership home. Working with our residents to achieve their aims, enables us to continue to work towards helping to shape communities that thrive through a mixture of rented and owned homes. We also added 2 new homes to our portfolio and as the year concluded, we were nearly complete on another 8 in Crapstone in Devon, a rural community desperately in need of additional affordable housing.

The impact of high inflation and interest rate increases has and will inevitably have an impact on how we invest into the future. As a new single organisation we have built resilience into our business plan and will continue to grow and invest to remain financially viable. The Board will be ratifying a new corporate strategy for 2023-27 later this year, which will inform our future strategic direction and will focus on people, property, place and planet.

Looking to the future, we welcome and are ready to embrace new social housing regulation. We will support our colleagues to build knowledge and skills to feel confident in the work that they do, and we will continue make their wellbeing and respect for their diverse experiences and individuality a central tenet of how we operate. We do so with the aim that this will result in service delivery that will make our tenants proud to be part of our organisation.

DONNA JOHNSON
CEO



Board Members



TIM SHOBBROOK
Chair



CRAIG SULLIVAN
Vice Chair



MICHELLE SMITH
Board Member and Chair of
Remuneration & Nominations
Committee



WENDY LEWIS
Board Member and Chair of
Development Committee



SIMON HASKELL
Board Member and Chair of
Audit & Risk Committee



BRIAN WHITTAKER
Board Member



STEPHEN BURTCHAELL
Board Member



STEVE HAYES
Board Member



SUE LANE
Board Member

Meet our Executive Team



DONNA JOHNSON
CEO



CATHERINE DAVIES-GALLAGHER
Finance Director



SUE SPARKS
Head of Corporate Services



HEATHER RIGG
Operations Director

Our Staff

AIDAN TRUELOVE-SPIERS
Asset Project Surveyor

ALEX SMITH
Housing Officer

AMANDA WEBB
Housing Officer

ANGELA DERRY
Shared Ownership and
Rentplus Officer

BRIAN CONDRON
Maintenance Officer

CADHLA GERAGHTY
Finance Manager

CLARE NORTON
Business Support Administrator

CONOR MAHER
Business Support Administrator

DAWN KIRBY
Maintenance Officer

DEBBIE JOHNSON
Housing Officer

EMMA BENNEY
Housing Officer

HELEN TAMBLIN
Development Assistant

JANE EAGLING
Corporate Services Assistant

JANEY MATTHEWS
Trainee Income and
Expenditure Officer

JEMMA BAILEY
Corporate Services Assistant

KAREN WALKER
Development Project Manager

KERRY WOOD
Rent & Income Management
Officer

LIZ FARMER
Corporate Services Manager

MARK GOODEY
Operations Manager

MARK JOHNSON
Business Support Administrator

MOLLY RICHARDS
Income and Expenditure Officer

NEIL BUCKLAND
Asset Manager

PAUL RAE BURN
Operations Manager

RIA GILLINGS
Development Project Officer

ROXANNE SWEETING
Business Support Manager

SANDRA HODGES
Business Support Administrator

SARAH PURDY
Business Support Administrator

SONJA LEWIS
Financial Analyst

WILL LLOYD JONES
Finance Manager

Consultation

During the course of the year, South Western Housing Society (SWHS) and Tamar Housing Society (THS) undertook a wide ranging consultation with tenants and residents on their proposed merger.

Though Willow Tree Housing Partnership (WTHP) had been operating in partnership since 2020, they remained separate legal entities during this time. It was important therefore, that residents' views were sought that could inform a final Board decision on the merits or otherwise of merging.

The process included sending letters to everyone; advising of the intention to merge and giving key facts about what this would mean for tenants and residents. The letters included a range of FAQs to promote transparency, and responses were invited in writing or by phone.

In addition to this a number of roadshow events were held for tenants and residents to come along and meet staff and ask questions face to face. These were held across the WTHP geographical area in Yate, Totnes, Cullompton, Bridgwater and Plymouth. Venues were chosen due to them being close to a significant stock density, and to ensure that anyone interested was able to attend at least one without there being significant travel time.



◀ **TOP LEFT:** Tenants attending the Roadshow Event at the West India House, Bridgwater.

TOP RIGHT: Local tenant along with a member of WTHP staff attending the Roadshow Event at The Ridge Junior School, Yate.

BOTTOM: The Roadshow Event at Stafford Court, Totnes, with a good turnout of tenants.

Celebration

OUTCOME

All residents were given the opportunity to have their say in respect of the proposed merger, with a number of ways to provide feedback being offered. The majority of those who attended the Roadshows or provided feedback in other ways were not concerned about the proposed merger. They were either positive or they attended to address other matters, such as those relating to repairs.

It was positive to note that there were no significant concerns in respect of the proposed merger and furthermore very little in the way of negative comments. This led to the Board approving the merger in February 2023.

CELEBRATION

The coming to an end of the partnership and the forming of one organisation, was a significant milestone for Willow Tree Housing Partnership. The organisation as a smaller provider appreciates the benefits of working in partnership with trusted advisers, experts and tenants to ensure it meets all its obligations.

The merger could not have happened without the support of a wide range of stakeholders who worked closely with the team to facilitate a successful conclusion.

To mark the occasion a celebration was held at the Plymouth National Marine Aquarium, home of the Ocean Conservation Trust, a charity with sustainable principles that mirror those of WTHP.

The event was attended by staff, tenants residents, Board members and partners who had worked with us to achieve our goal. It was a fitting end to a perfect beginning and we would like to thank each and every supporter of WTHP for their continued advocacy for providing new homes and services to people at times of need. We will seek to remain effective custodians of this vital resource both now and long into the future.



Tenant Satisfaction Survey

Tenant Satisfaction Measures (TSMs) are intended to make Landlords' performance more visible to tenants and to enable tenants to hold their landlords to account. TSMs are a set of satisfaction measures that relate to maintaining building safety, keeping properties in good repair, effective complaints handling, respectful and helpful tenant engagement and responsible neighbourhood management.

In 2023/2024 Willow Tree Housing Partnership (WTHP) will, in accordance with regulatory requirements, survey all tenants and ask questions specifically related to the TSMs. In preparation for this and so that we have an understanding of the process of what tenant satisfaction looks like in a 'post-COVID world', WTHP asked a proportion of tenants to share their views in a short survey.

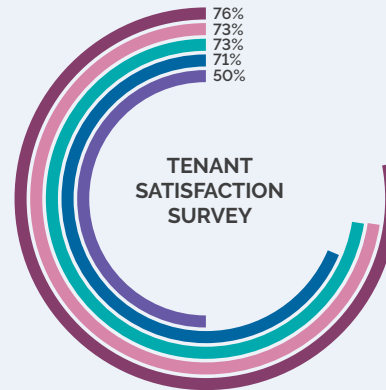
Throughout the survey good levels of satisfaction were found, and the findings were an endorsement of the commitment of WTHP and its staff. However, slightly lower levels of satisfaction were related to communication issues, including listening to views and acting upon them, as well as the way complaints were handled.

WTHP is already working hard to address these matters, including the introduction of a new complaints policy and procedure which reflects the Housing Ombudsman's Code. A Resident Involvement Strategy is also being implemented which will mean residents will have more opportunity to have their say in how the organisation is run.

New Willow Tree website launched



8 | willowtreehousing.org.uk



- agreed we are easy to deal with
- agreed we provide a safe home
- agreed we treat them with respect
- agreed they are satisfied with our overall services
- agreed they would recommend us to others

A new website showcasing our new logo was launched on 31 March 2023 to celebrate the joining together of South Western Housing and Tamar Housing.

When South Western Housing and Tamar Housing were working in partnership, there was a requirement for both organisations to have separate websites. Once plans were in place to merge, work started on the design of a new logo and a new website for Willow Tree Housing Partnership (WTHP). We worked with a company who were already known to us and who specialised in designing websites for housing associations, Kiswebs.

We wanted our new website to be interactive and informative for our residents and stakeholders. The final website is a result of collaborative working with colleagues, residents and board members. We started the project with a group of staff members from different teams across WTHP. Once we had a draft site to test out, we asked one of our board members and 5 residents for feedback on how the site looked visually and how user friendly it was, i.e., was it easy to report a repair or pay rent. We received constructive feedback and all recommendations were incorporated in the final design which can be found here www.willowtreehousing.org.uk.

We understand the importance of keeping a website up-to-date and we have incorporated a noticeboard on our home page where we will always publish our latest news and articles of interest. Our Tenants' Handbook can be found on the website and residents can access MyTenancy portal direct through our website.

BATTS MEADOW, NORTH PETHERTON

Following the success of our units at Stoke St Gregory, we are pleased to be working once again with Otter Construct at Batts Meadow in North Petherton, Somerset. Creating some high quality properties which incorporate a range of eco-friendly features, including electric vehicle charging points, solar panels and air source heat pumps. Work has already begun on site, with the houses being built to nationally described space standards (NDSS) to provide good-sized family homes. The properties comprise two x 2 bedroom shared ownership houses, four x 2 bedroom affordable rent houses and one x 3 bedroom affordable rent house. With some properties further advanced than others, it is intended to take handover of all seven affordable homes in February 2024.



AT CRAPSTONE WILLOW TREE HOUSING PARTNERSHIP USED A FABRIC FIRST APPROACH TO CREATE THESE HIGH STANDARD HOMES AND ENSURE THEY ARE AFFORDABLE TO RENT AS WELL AS RUN AND INCLUDE ELECTRIC VEHICLE CHARGING POINTS.



THE MEADOWS, CRAPSTONE

Whilst completion of the scheme of 8 new affordable properties on the edge of Dartmoor National Park, Devon was planned for March 2023, unfortunately labour shortages and adverse weather prevented this from taking place. Working with Classic Builders and West Devon Borough Council on this rural development of 6 affordable rent and 2 shared ownership homes, Willow Tree Housing Partnership (WTHP) used a fabric first approach to create these high standard homes and ensure they are affordable to rent as well as run and include electric vehicle charging points. Handover of these properties to WTHP is on schedule for April 2023.

FUTURE SCHEMES

We continue to look at other opportunities with local developers and will soon commence the preparation of contracts for another site just outside of Taunton, Somerset which will include 1 x shared ownership and 4 x affordable rent properties. Working with a local developer who we have worked with before, these homes will include air source heat pumps, solar panels and battery storage, as well as electric car charging points. Work is expected to start on site in September 2023, with an estimated completion of Summer 2024. Further pipeline schemes are also being worked on within both Devon and Somerset.

BURNT HOUSE FARM, NORTH NEWTON

Working with another local developer, Gadd Properties, we will also deliver two new 3 bedroom houses in the village of North Newton, Somerset. This small scheme of 6 units is being built on a former farmyard and includes two x 3 bedroom affordable rent properties with air source heat pumps. We are anticipating these homes will be completed in October 2023.

Investing in Assets



Oil heating replacement with air source heat pumps – Stoke Fleming

As part of Willow Tree Housing Partnership's (WTHP) planned works programme for environmental reasons and energy efficiencies for residents, a project was implemented to remove oil heating boilers from 10 properties at School Road in Stoke Fleming. These boilers were supplied from communal oil tanks at that scheme, and works were carried out by Gregor Heating and AS Plumbing & Heating respectively during the Spring and will continue into Autumn of 2023. Renewable energy replacements of air source heat pumps (ASHP) and associated controls will be installed and linked into the existing solar thermal panels providing hot water. This is proving to be a very successful project and means that there will be no further reliance on oil heating systems at those properties. Our residents will have more efficient and reliable heating systems. WTHP are committed to working towards net zero carbon, reducing fuel poverty and upgrading its properties to become more energy efficient.



Holyrood Court – replacement of passenger lift

Due to the age and repairs that were required to the lift, a strategic decision was taken for this passenger lift to be replaced. Willow Tree Housing Partnership (WTHP) awarded the contract to the lift servicing contractor – TK Elevator UK Limited (TKE) to carry out this work. In collaboration with them, the specification was agreed and the lift was put into manufacture. TKE provided a full contract package for the removal and installation of the new lift. TKE were able to provide a slightly larger lift car than the original, due to space available within the lift shaft. The site work commenced in February and will be completed in May 2023.



BROADPARK IS A SCHEME THAT IS SITUATED ON A STEEP INCLINE, THIS MEANS THAT SOME OF THE PROPERTIES ENJOY LOVELY VIEWS.

Okehampton Log Walls

In Autumn 2022 Willow Tree Housing Partnership (WTHP) undertook major works at Broadpark in Okehampton to replace the log walls. Broadpark is a scheme that is situated on a steep incline, this means that some of the properties enjoy lovely views. However, this also means that there is a requirement to ensure that there is a retaining structure where there is a difference in ground level. The pre-existing retaining log walls were identified several years ago as requiring replacement, in order to ensure they are effective and safe.

WTHP used Cruse and Bridgeman Contractors with whom they had previously worked. NRP Consultancy acted as contract administrators working alongside Craddys Structural Engineer Ltd.

Every effort was made to minimise the disruption to our tenants, but unfortunately some disruption was unavoidable; a section of the car park needed to be used to house the site office and other equipment. Compensation was paid to those tenants impacted. We also had to move one tenant from their home for a six week period; they occupied a holiday apartment in the country and were supported throughout the process. Works are now finished and a structure is in place that will serve Broadpark for many years to come.

Leigham Court, Plymouth – Successful bid for retrofit project

In respect of Willow Tree Housing Partnership's (WTHP) commitment to ensuring sustainable and energy efficient housing provision to the existing property stock, a bid was made through the West of England Combined Authority (WECA) to the Government's Department for Energy Security and Net Zero (DESNZ), for energy retrofitting works to Leigham Court. Leigham Court is a block of flats in central Plymouth.

As part of the bid, WTHP was required to provide co-funding towards the project. The bid was successful and through a procurement framework agreement with Prosper Procurement Limited, the contract was awarded to LivGreen. Due to the type of existing construction and layout of Leigham Court, it is anticipated that there will be a range of external and internal aspects of retrofitting works to ensure that the flats achieve a minimum of Energy Performance Certificate (EPC) rating C.

Resident engagement is paramount for this project and residents will be involved from the outset. LivGreen will be preparing the scope of works and are to carry out additional surveys and investigations of the building. WTHPs' Asset Manager is working closely with WECA on project monitoring and reporting. It is expected that to comply with the bid funding criteria, the retrofitting site works will be carried out between 2023 and Spring 2025.

This project will provide a range of benefits to our residents with improved heating and ventilation within their flats, giving greater energy efficiency and expected lower fuel costs. Upgrading of thermal insulation to the building is part of the overall package of works being considered.

WTHP is part of the WECA's consortium of other registered housing providers within the wave 2 round of Government funding for the improvement of energy efficiency within social housing. Leigham Court will be the first major sustainability project for WTHP.

New properties at Tiverton – mutual exchanges

NEW PROPERTIES AT POST HILL, TIVERTON

In 2022/23 Willow Tree Housing Partnership (WTHP) were proud have let 2 new properties in Tiverton for the first time. There is a two and three bedroom house, built to a high specification and perfect for families. The properties were built by our partners Burrington Estates and are part of a larger scheme of 18 properties. These sit nicely within our existing housing stock in Tiverton where we already manage 13 homes.

MUTUAL EXCHANGE

For those looking to move, doing a mutual exchange is one way in which WTHP tenants can move house. Anyone who holds a social or affordable housing tenancy can apply to swap properties with anyone who holds the same tenancies with WTHP or with another Housing Provider, including properties where the landlord is the Local Authority. Tenants who choose this route can consider any tenancy, in any location in the country and can search for properties that they may be interested via Homeswapper. This method of moving remains highly effective, particularly for those who may not be eligible for a high banding on the Housing Register.



"THE HOUSE IS PERFECT FOR ME AND MY FAMILY, IT HAS WIDE DOORWAYS WHICH ARE PARTICULARLY IMPORTANT AS ONE OF MY CHILDREN USES A WHEELCHAIR."

TENANT OF A THREE BED HOUSE





Rentplus 2022-23

The Rentplus scheme has enabled another four families to achieve their goal of owning their own home.

Despite the impact of COVID19 and the current cost of living crisis, the tenants of two houses in Plymouth, one in North Tawton and one in Sherborne have purchased their homes, assisted by a 10% gifted deposit from Rentplus. Three further sales are progressing and a substitution is being sought to allow another family more time to prepare to purchase.

Demand for Rentplus homes has remained consistently high with hundreds of bids placed through the Choice Based Lettings systems each time a property becomes available for re-let. However, turnover of these properties remains low with 75% of the four properties in 2022-2023 having been sold to the original tenant, and the remaining 25% being sold to the second tenant to live in the home.

2023-2024 is due to be a busy year for Rentplus sales, with 13 homes due to be purchased. Of these, two have already been vacated as the

residents have bought elsewhere and these cannot be re-let on the Rentplus scheme this close to the end of the agreed period. One house in Sparkwell, Plymouth is being purchased by Willow Tree Housing Partnership (WTHP) and will become a rented home. A flat in Shaftesbury has been handed back to Rentplus and sold on the open market, a portion of the sale price will go to the local authority to support further affordable housing.

There are currently challenges facing many, including Rentplus residents, as the recent rise in mortgage interest rates combined with high property prices means some are struggling to achieve the mortgage they need. However, there continues to be interest from others who are keen to buy early. The option to substitute agreed rental periods means we can enable this, whilst allowing others who are currently struggling more time to save.

Repairs retender – new contractors for Willow Tree



After a thorough selection process our new contractors started in September 2022. Residents were central to this process, with their views gathered by a survey then incorporated into the tender and then sitting on the contractor interview panels.

MSB Property Services were appointed for the Responsive Repairs contract for Cornwall, Plymouth, West Devon, South Hams and Teignbridge area. MD Group are responsible for all other responsive repairs in Willow Tree Housing Partnership's other geographical property areas. All Heating and Renewable servicing and repairs was awarded to Gregor Heating.

KEY STATS IN 2022-23

3250 Repairs were completed

9.9 The average turnaround time for responsive repair jobs was 9.9 days

691 Since start of the new contract to March 31st MSB completed 691 jobs with an average cost of £99.81

657 In the same period MD completed 657 jobs at an average cost of £206



Our approach to damp and mould

Awaab Ishak, a 2 year old boy from Rochdale died of prolonged exposure to mould in his family's flat in 2020. This was a defining moment for housing in the UK and has led to significant changes in expectations in how reports of damp and mould should be managed. This was set out in a Housing Ombudsman report in October 2021 titled "It's not lifestyle". Willow Tree Housing Partnership (WTHP) developed an action plan based on the recommendations in this report.

WTHP held a co-production event with 7 residents in February 2022 to find out their views on how damp and mould cases should be managed. Clear communication around actions was identified as key, as well as having sympathetic tenant centred communication. Specialist contractors to diagnose the issues was thought of as a positive approach. The tenants contributed to a newsletter article and earlier this year to our Damp and Mould Policy and Procedure.

The new approach aims to deal with reports of damp and mould promptly depending on the severity of the problem. When it is likely there is either penetrating or rising damp an inspection will take place within a week. When it is less clear or the most likely cause is condensation an inspection will take place within 3 weeks. Our contractors have specialist damp and mould firms who can visit and make repairs which will be agreed with tenants. Also, advice will be given on how to ventilate and heat homes effectively. Two months after repair works are completed follow on contact will be made to assess how effective the works have been, and if required a follow on visit will be made.

Listening to our tenants

The management and handling of complaints has never been more important to social housing landlords, in July 2023 the Social Housing Regulation Bill should achieve Royal Assent meaning that the Housing Ombudsman's Complaints Handling Code will become a statutory requirement for all landlords.

Willow Tree Housing Partnership (WTHP) is focusing its attention on listening to our tenants to establish strong lines of communication. We want to solve problems quickly and prevent others from happening in the first place.

We have reviewed our Complaints Handling Policy and Procedure to ensure that our complaint handling process is accessible to our tenants, is consistent, and that it enables the timely progression of complaints for our tenants, as set out in the Housing Ombudsman's complaint handling code. We also complete the Ombudsman Complaint Handling Code self-assessment annually, this enables us measure our performance and compliance against the code.

Our self-assessment, along with our Complaints Policy, Procedure and the Housing Ombudsman Complaint Handling Code can be viewed on our website www.willowtreehousing.org.uk

During the course of 2022/23 WTHP have gone on a journey to embed a positive complaint handling culture with staff, taking the view that complaints are to be welcomed as an opportunity to learn and improve service delivery for our tenants.

Complaints received in the year April 2022 until March 2023 have followed the national picture and have been increasing, for example the number of complaints received in the final 3 months January, February and March 2023 equated to more than were received in total the previous year.

There were 42 complaints received and managed during the period and these can be broken down further into:

Stage	Complaints Logged
Informal	28
Stage 1	8
Stage 2 Review Panel	2
MP/Councillor Enquires	3

During the period there were 9 complaints received that were officially recorded. It is always good to reflect on this positive feedback and certainly both staff and contractors appreciate that tenants and stakeholders take the time to make the positive comments.

It is clear early intervention with complaints handling ultimately has led to more successful outcomes, with a significant reduction in complaints escalating to a Stage 1 complaint.

A key theme that has arisen from the complaints being managed during the period, is undoubtedly linked to management of tenant expectations and prompt communication. Where complaints have failed to be resolved in the earlier stages of the complaints process, a lack of clarity in respect of the expected outcomes of tenants alongside listening and understanding to their concerns have at times led to matters escalating. This is something we will be focusing on going into 2023/24.

WTHP are committed to embedding a positive complaints handling culture amongst the team, committed to early resolution and working with our tenants for positive outcomes and remedies. Complaints are reviewed at leadership and executive meetings and will be reported on in quarterly performance reporting.



Staff Volunteering

A number of employees at Willow Tree Housing Partnership (WTHP) are engaged in volunteering roles. Emma Benney, one of our Housing Officers and Angela Derry, who is our Shared Ownership and RentPlus Officer, have kindly shared some of their volunteering experiences with us.

Angela was given a paid day off to volunteer for the elected Members of Youth Parliament (MYPs) from the Somerset UK Youth Parliament Group. She attended the annual debate at the House of Commons, an incredible event with young people from all across the UK being invited to hold a full day of debates in the chamber, overseen by the Speaker of the House of Commons.

Angela Derry is a voluntary Youth Worker at Somerset Council and supports the Participation and Engagement Officer who runs the group. The UK Youth Parliament is a national initiative which involves young people aged 11-18 making a difference within their communities and nationally through the campaigns they run. In Somerset there are three elected MYPs, supported by three deputies and a wider advisory group. The group members come from all walks of life and bring lots of wider experiences and knowledge to the table.

Angela says "It's a really rewarding role where I get to be part of the amazing development the young people go through during their time in the group. I am constantly impressed by young people's ability to make a difference and fight for change"

Emma has been volunteering for a Devon based charity 'Hope for the homeless' at the Garage Café in Plymouth since December 2022.

The café is open 6 evenings a week and can be visited by anyone who is homeless, lonely, vulnerable or is a former member of the armed forces. The charity relies upon donations of bedding, tents, clothing and food, the volunteers prepare hot food and drinks serving around 70 meals a night. Without the small group of volunteers the café would not be able to open. Emma's role is to welcome people, ask them what they would like to eat and drink and ask if they need any clothes or bedding.

Emma says "The role is very rewarding and every night we receive numerous thanks from grateful users of the service, saying that they really appreciate the work that we do"



Defibrillator machine donation to East Brent Council

We were approached by a representative of East Brent Parish Council, Somerset to support their defibrillator machine initiative. The Parish Council's initiative is to provide the opportunity for residents in the area to access a defibrillator machine, should they have a cardiac emergency and are waiting for an ambulance to arrive. We donated £1,000.00 from our Community Fund towards the purchase of a defibrillator for the Rooksbridge area and it is located on the wall in front of our offices. The machine is maintained, owned and monitored by the Parish Council. The defibrillator machine is registered on the National Defibrillator database, meaning that it can easily be located and used in an emergency situation by dialling 999.

Spaxton scheme

A Housing Officer and Maintenance Officer at Willow Tree Housing Partnership (WTHP) were involved in the improvement of the outdoor space at one of our schemes in Spaxton, Somerset. The scheme is a mixture of rented and shared ownership properties.

During a post pandemic inspection of the scheme, it was clear that the area needed some rejuvenation; there were some issues with excess rubbish, overgrown land, old fencing and derelict outbuildings. Tenants were consulted around improvements to the estate and a tidy up day was organised for the area; old fencing was replaced, overgrowth and rubbish cleared and old outbuildings were removed.



Plastic Bottle clear up

As part of our commitment to recycle more plastics, we posted on our website and social media about a wonderful example of problem solving and team work by our Housing Officers, Emma Benney & Debbie Johnson. The Housing Officers supported one of our tenants to remove a large number of plastic drinks bottles from their home. The bottles were then delivered to the 'Garage Café on Union Street, Plymouth who ensured that they were cleaned and then filled them with orange squash before giving them to the homeless. This is what you call a win win!

The posts about Plastic Free July #PlasticFreeJuly encourages all of us to look at reducing the amount of single use plastic we use. It has some great ideas and advice too, and you can join in by just doing something small such as using bars of soap instead of liquid soap in plastic bottles. For more ideas they have a dedicated website -

plasticfreejuly.org/get-involved/what-you-can-do

Bug House

We had the pleasure of working with Greenslades Ground Maintenance, Bridgwater on the implementation of newly designed and rejuvenated courtyard at our Rooksbridge office in Somerset. As part of the design we wanted to incorporate something that would encourage more wildlife into the area, increase the pollination of the flowers, improve the quality of soil, and be a thriving garden through the use of biological pest control instead of harmful pesticides. It also encourages staff wellbeing and gives them a pleasant area to sit in to enjoy their lunch, surrounded by nature and wildlife.

The design of the bug house exceeded our expectations, in terms of both size and stature. The different levels made from a range of materials will encourage a variety of insects to make this their new habitat. It has an all-weather pitched roof and the entire structure is made from sustainable materials, therefore we envisage it lasting many years and through the range of weather conditions of the Somerset countryside.

Our Staff Forum voted to decide upon a name for the bug house and the name Bugingham Palace was settled on, a sign was produced complete with a crown.



THIS PROVED TO BE A GREAT PROJECT TO WORK ON, IT WAS WONDERFUL TO SEE THE TRANSITION AND CRUCIALLY TO HAVE THE RESIDENTS INVOLVED FROM THE OUTSET.



Consumer Standards

The Regulator of Social Housing's objective is to promote a well-governed, viable and efficient social housing sector that is able to deliver homes meeting a range of needs. To achieve this the Regulator has set four consumer standards which are broken into categories. Some of Willow Tree Housing Partnership's activities in relation to the Standards are shown

HOME STANDARD

The Home Standard sets expectations for registered providers of social housing to provide tenants with quality accommodation and a cost-effective repairs and maintenance service.

- Procured and awarded new repairs and maintenance contracts and gas servicing, maintenance and replacement contracts
- achieved 12.9 days average end to end time for responsive repairs
- Achieved 83% customer satisfaction in relation to responsive repairs
- As part of our 5 year cyclical testing of electrics, 931 electrical tests are complete and a further 463 are due within 10 years.
- Continued to ensure that 100% of our homes were tested for gas safety
- We completed 114 stock condition surveys as part of our aspiration to survey 20% of our housing stock on an annual rolling basis

- We replaced 37 bathrooms, 6 kitchen replacements and replaced 57 gas boilers
- We replaced 32 fire doors
- We removed the last of our oil fired heating systems and replaced with renewable technology
- We supported 7 Local Authority Disabled Facilities Grants and completed 16 adaptations for our residents
- 100% of WTHP homes meet Decent Homes Standards

TENANCY STANDARD

The Tenancy Standard sets expectations for registered providers of social housing to let their homes to tenants in a fair, transparent and efficient way.

- There were 57 properties re-let in 2022/23 and the average turnaround time for letting was 17 days
- There were 2 new social housing homes in Post Hill Tiverton



“
100% OF WTHP HOMES MEET
DECENT HOMES STANDARDS
”

NEIGHBOURHOOD AND COMMUNITY STANDARD

The Neighbourhood and Community Standard sets expectations for registered providers of social housing to keep the neighbourhood and communal areas associated with the homes they own clean and safe, co-operate with relevant partners to promote the wellbeing of the local area and help prevent and tackle anti-social behaviour.

- There were 51 cases of anti-social behaviour managed and dealt with
- The focus on continued contact with all residents on a face to face basis annually remains a priority
- Working with local authority and other social service partners to enhance the experience of our tenants
- Made £2,275 community fund payments

TENANT INVOLVEMENT AND EMPOWERMENT STANDARD

The Tenant Involvement and Empowerment Standard sets expectations for registered providers of social housing to provide choices, information and communication that is appropriate to the diverse needs of their tenants, a clear approach to complaints and a wide range of opportunities for them to have influence and be involved.

- Received 28 informal complaints, 8 stage 1 complaints and 2 stage 2 complaints
- Complaints were resolved within an average of 10 working days for informal complaints and 15 days for stage 1 complaints
- Received 10 disrepair claims

- Awarded the Tenant Satisfaction Contract to Acuity and undertook a benchmarking satisfaction survey priority to the introduction of Tenant Satisfaction Measures in 2023/24
- Involved tenants in the procurement and award of our responsive repairs and gas contracts
- Had tenant volunteers test and provide feedback as part of our new website
- Made £6K Hardship Fund payments
- Attended Tenant Engagement Conference in London with 3 tenants
- Held merger consultation sessions with our tenants prior to the merger progressing in March 2023
- Commenced work to review our tenant engagement strategy, developing an action plan and introducing a resident engagement panel due to commence in Sept 2023.



Properties Information 2022/23

HOUSING STOCK	Tenure
Total Properties	1499
General Needs	1169
Shared Ownership Properties	99
Rent Plus Managed Properties	231

We let 57 properties during 2022/23

ENERGY EFFICIENCY	Statistic
Homes with EPC C or above as %	85%

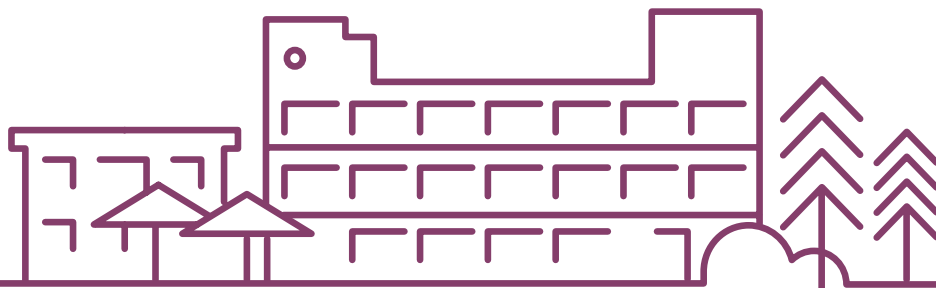
TENANT FEEDBACK	Statistic
Compliments Received	9
Complaints Received	38
Complaints Resolved	100%

COMPONENT REPLACEMENTS		
Component	Number	Cost £k
Kitchens	6	47
Bathrooms	37	202
Doors & Windows	4	28
Gas Boilers	57	160
Oil Heating converted to Renewables	10	132
Renewable Heating Systems	3	31
Electric Heating	5	12
Total	122	612

TENANT SATISFACTION	Statistic
Satisfied with Landlord Services	92%
Satisfied with Repairs Service	83%

This was data collected from a satisfaction survey carried out during 2022/23 by a 3rd party

DECENT HOMES	Statistic
Homes which met Decent Homes Standard	100%



Performance Indicators

Key operational and financial metrics for the organisation are shown in the tables below. For the 2022/23 financial year, WTHP is reporting the combined results of the former partner organisations (South Western Housing Society and Tamar Housing Society) who merged on 31 March 2023.

INDICATOR	2022/23	2021/22
Current tenant arrears		
• Owned rental properties	4.43%	4.22%
• Shared Ownership	3.30%	3.14%
• Rentplus managed properties	2.37%	2.00%
Lettings end to end time for voids (Average days)	19.3	11.74
Repairs end to end time (days)	12.9	10.6
Number of repairs undertaken	3,443	3,401
Gas Safety	99.9%	99.3%
Electrical Safety	82.9%	76.4%

VALUE FOR MONEY METRICS	2022/23	2021/22
Reinvestment %	2.48%	2.59%
New supply delivered %	0.16%	2.53%
Gearing %	27.10%	26.06%
Earnings before interest, tax, depreciation, amortisation, major repairs included (EBITDA MRI) interest cover %	61%	225%
Earnings before interest, tax, depreciation, amortisation, major repairs included (EBITDA MRI) interest cover % (excluding impact of the Dexia loan break costs)	118%	225%
Headline social housing cost per unit £	£5,672	£5,043
Operating margin %		
• Social housing lettings only	18.18%	23.75%
• Overall	21.89%	28.06%
Return on capital employed (ROCE)	2.11%	2.83%

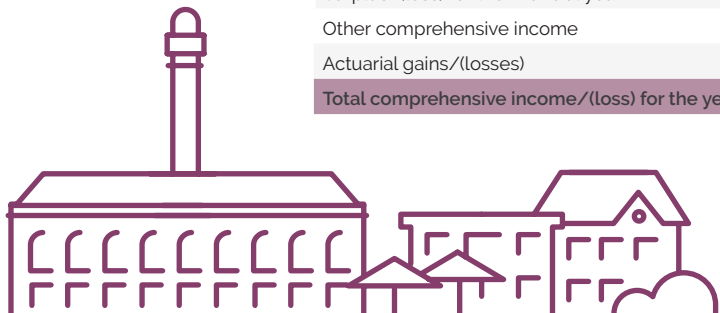
Note that these metrics are prepared in line with the definitions required by the Regulator for Social Housing, for this purpose. However, an additional calculation of the Earnings before interest, tax, depreciation, amortisation, major repairs included (EBITDA MRI) interest cover % has been shown, excluding the impact of the Dexia loan break costs.



Financial Statements

STATEMENT OF COMPREHENSIVE INCOME

FOR THE YEAR ENDED	31 March 2023 £'000	31 March 2022 £'000
Turnover	8,871	9,347
Cost of sales	(71)	(797)
Operating costs	(7,307)	(6,407)
Surplus on the sale of housing properties	449	473
Surplus on sale of other assets	-	7
Operating surplus	1,942	2,623
Other income	6	2
Interest receivable	25	1
Interest and financing charges	(2,583)	(1,178)
Surplus/(loss) for the financial year	(610)	1,448
Other comprehensive income		
Actuarial gains/(losses)	(96)	153
Total comprehensive income/(loss) for the year	(706)	1,601



Financial Statements

STATEMENT OF FINANCIAL POSITION

FOR THE YEAR ENDED	31 March 2023 £'000	31 March 2022 £'000
Fixed Assets		
Intangible assets	91	27
Tangible fixed assets - housing properties	88,671	88,074
Tangible fixed assets - other	717	802
Investments	260	260
	89,739	89,163
Current Assets		
Properties for sale	-	67
Stock	177	3
Debtors	812	1,155
Cash at bank and in hand	4,167	5,359
	5,156	6,584
Creditors		
Amounts falling due within one year	(2,730)	(3,048)
Net current assets	2,426	3,536
Total assets less current liabilities	92,165	92,699
Creditors		
Amounts falling due after one year	(52,840)	(52,921)
Provisions for liabilities	(549)	(271)
Net Assets Excluding Pension Liability	38,776	39,507
Pension Liability	(616)	(641)
Net Assets	38,160	38,866
Capital and Reserves		
Income and expenditure reserve	30,792	31,498
Revaluation Reserve	7,368	7,368
WTHP's Funds	38,160	38,886



Auditors, Solicitors, Banks and Lenders

EXTERNAL AUDITOR

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Melville Building East, Royal William Yard
Plymouth PL1 3RP

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WILLOW TREE
HOUSING PARTNERSHIP

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Willow Tree Housing Partnership Limited is a charitable housing association registered in England and Wales with the Regulator of Social Housing; L2424 and a registered society under the Co-operative and Community Benefit Societies Act 2014; 12666R