



CORPORATE STRATEGY

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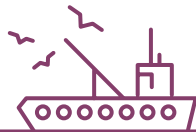


1 | The Organisation

Willow Tree Housing Partnership Limited (WTHP) is a community focused, smaller housing association operating across the south west of England that owns and manages just under 1500 homes, provided for people that find accessing the general housing market a challenge. The organisation is proud of its roots as a business with a social purpose at its heart.



OUR WELL-QUALIFIED AND DIVERSE BOARD HOLD THE NECESSARY SKILLS REQUIRED TO ENSURE EFFECTIVE OVERSIGHT OF OUR LONG TERM FINANCIAL HEALTH AND COMMITMENT TO SERVICE PROVISION OF THE HIGHEST STANDARD TO ALL TENANTS AND RESIDENTS.



The property portfolio spans a wide range of local authority areas, from Calne in Wiltshire through to Saltash in Cornwall, though most homes are located within Somerset and Devon. The nature of the stock is diverse, providing urban houses and flats in Plymouth as well as smaller estates in market towns such as Bridgwater and also a sizeable provision of small developments in rural areas across the region. WTHP has an office presence in both of its key locations of Somerset and Devon.

WTHP is led by a well-qualified and diverse board that hold the necessary skills required to ensure effective oversight of its long term financial health and its commitment to service provision of the highest standard to all tenants and residents.

The tenants, partners and stakeholders are supported by a staff team of 33. Comprising the executive, functional managers and frontline deliverers who manage the day to day operations. Operating as a smaller enterprise, this team is required to maintain high levels of knowledge and skills that are needed to ensure performance indicators are met, the finite resources are managed well, and customer service is of the highest standard. Regular professional development is provided and the importance of employee wellbeing forms an integral part of the culture of WTHP as set by the board.

As a result of a merger concluded in 2023, WTHP is now treated as a large provider by its regulator. This assignment means that WTHP is now subject to a higher degree of scrutiny and will have its assessment ratings recorded in the public domain for the first time in 2024. Both the board and the staff team feel confident in their ability to be held to public account and take seriously their role in providing safe, comfortable and desirable places that people can call home.

This strategy is written at a time of economic uncertainty hitherto not experienced for many years, with rising interest rates, high inflation and a cost of living crisis that affects many of those that WTHP provides services to. In order to ensure that its social purpose and service ethos remains fundamental to the way in which WTHP operates now and into the future, the strategy places at its heart the organisational vision, mission and values.

It is against these that all decisions are made and success measured against.

A | Doing Business with Us

Everybody involved in WTHP without exception works within an agreed set of values that define how we operate, and how we treat each other and our residents and our stakeholders.

We recognise that the world we operate in is as diverse as it is complex. Everyone is different and to ensure we work collaboratively and respectfully to achieve common goals, we set and agree parameters within which any individual can comfortably work, or be associated with. Our values reflect our commitment to our social purpose and these are:

STRIVE

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

Anybody who works with us, pays rent to us, seeks services from us or collaborates in achieving shared goals with us can expect these values to be at the core of all of our business practices.

B | Our People

WTHP is committed to ensuring that the organisation is a positive place to work, since this then offers fulfilment, improves motivation and ultimately drives a better service.

To achieve this, the board unequivocally champions an open culture that supports professionalism and is policy driven in its approach.

Colleagues have the opportunity to be and are involved in all aspects of organisational delivery, including feeding into the strategic aims and objectives of WTHP.

WTHP aims to be an organisation where all staff feel valued as individuals who enjoy coming to work and can clearly understand how what they do supports our key aims and objectives.



WE AIM TO BE AN ORGANISATION WHERE ALL STAFF FEEL VALUED AS INDIVIDUALS WHO ENJOY COMING TO WORK AND CAN CLEARLY UNDERSTAND HOW WHAT THEY DO SUPPORTS OUR KEY AIMS AND OBJECTIVES.



2 | Strategic Purpose

WTHP is a brave and confident organisation. The board is determined to continue to provide social housing into the future at a time when demand still far outstrips supply.

It is determined to ensure that our properties are invested in and kept safe for the people that live in them both now and into the future. It is committed to WTHP playing its part to reduce the stress that human activity places on the world that we live in.

Its leadership is clear and built upon a sound vision and mission, and in

depth understanding of both the current risks and those that continue to emerge in the operating space. The provision of new homes and services in a not for dividend organisation with charitable objects requires skill and passion.

WTHP will deliver our corporate objectives because we know why we do what we do;

OUR VISION

Deliver and Grow - aiming to create a space for those excluded from the market; to achieve a more level playing field from which they are able to build a successful life.

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.

3 | Our Plans To Achieve This



WE BELIEVE THAT UNDERSTANDING THE NATURE OF OUR PROPERTIES AND TARGETING INVESTMENT APPROPRIATELY IS THE MOST EFFICIENT WAY OF DELIVERING A GOOD QUALITY PRODUCT.



STRATEGIC OBJECTIVES

The following strategic objectives have been set by the Board after reviewing feedback from colleagues across the organisation and the results of feedback from tenant satisfaction surveys. It is against these goals that WTHP will measure its success over the next three years:

PEOPLE We will invest in and listen to all voices and seek learning to improve outcomes for all

PROPERTY We will maintain and manage property that we and our tenants are proud of

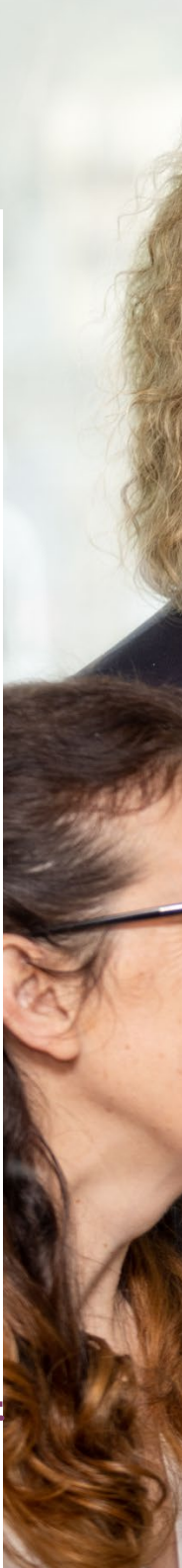
PLACE We will ensure that a positive connection to home as a safe and sustainable place is central to our work

PLANET We will create homes and services that protect the future

The following strategic objectives have been set by the Board after reviewing feedback from colleagues across the organisation and the results of feedback from tenant satisfaction surveys. It is against these goals that WTHP will measure its success over the next three years:

DATA AND THE CYBER ENVIRONMENT

These objectives are set in the knowledge that WTHP operates in an increasingly digital space. To fulfil our goals, it will be essential to harness and use good data, invest in digital infrastructure to support more efficient working practices for both staff and tenants, and invest in the appropriate security and training needed to mitigate threats to our intellectual property.





A | People

WTHP is a people focused organisation, whether that is its employees, tenants and residents, or partners and stakeholders that we work with.

It is essential that this powerful resource is harnessed to create a working and service environment that is fit for the future.

The world is changing; digital by default is becoming a norm, 24/7 access to goods and services is an expectation of all, and the ability to strike a balance between professional and personal life has become business as usual for both new entrants into the job market as well as an ageing workforce.

WTHP will make sure that nobody is left behind; we will build capacity for all to enjoy a seamless service that leads to high levels of satisfaction whether that be as an employee, a partner or a tenant of the organisation.

By 2027 we will:

- Create a digital mindset among staff that generates efficiency savings to be reallocated to frontline services.
- Create a team of skilled and motivated knowledge workers who can utilise data to offer effective assurance to tenants and the board and regulator.
- Create a workforce plan that integrates agile working with clear succession planning and supporting apprentices
- Build a framework that enables all tenants to be confident with using a digital first approach.
- Develop and deliver an inclusion plan for tenants and residents to ensure that 100% of voices are heard.

B | Property

WTHP believes that understanding the nature of our properties and targeting investment appropriately is the most efficient way of delivering a good quality product. Guaranteeing safety is also a prerequisite for any good landlord.

To be proud of the stock we provide, the next three years will ensure that we increase our focus on knowledge driven assets, ensuring stock condition is of a robust standard, and applying a data focused approach to review the financial position of schemes down to an individual property level.

This data driven approach will enable WTHP to maintain the highest of standards in relation to health and safety compliance, providing assurance to residents and tenants.

WTHP will seek to learn from the retrofit pilot project at its block of flats in Leigham Court, Plymouth and will continue to work towards achieving its target of EPC C for all homes by 2030.

By 2027 we will:

- Complete a wholesale retrofit to one block of flats, working with tenants and staff to build knowledge and understanding of different energy sources.
- Dispose of assets that are unsustainable in the longer term and reinvest the proceeds into more efficient homes elsewhere.
- In conjunction with the resident scrutiny panel, explore the introduction of digital sensors in homes that will support future planning and investment.
- Build an asset management strategy that is fully costed and sustainable.



C | Place

A positive personal connection to place is the yardstick by which life satisfaction can be measured. Where you live can enable or disable the opportunity for personal growth.

The delivery and management of good social housing should be a fundamental tenet of all registered providers and WTHP is no exception. We understand that a good place equals positive performance and less dissatisfaction. Where we build and manage must be central to our work.

By 2027 we will:

- In conjunction with our residents, develop a Willow Tree Community Standard, agreeing a minimum standard by which all residents can judge their home and neighbourhood.
- Actively seek to secure grant funding for the delivery of new affordable homes.
- Review our development strategy to build in flexible living and working space.
- Build 60 new homes.
- Deliver a new office for Plymouth owned by WTHP.

D | Planet

WTHP accepts that the earth is facing a climate change emergency and knows that the housebuilding sector is a significant contributor.

The board is dedicated to achieving net zero carbon by 2050 and recognises that this is a sizeable task. A clear plan is required that will enable colleagues and residents to know the direction of travel and learn more about what a truly sustainable future looks like.

During the course of the next three years, the organisation will seek to build knowledge and learning whilst at the same time seeking to achieve some tangible targets that will support its ESG (Environmental Social Governance) overall aims.

By 2027 we will:

- Increase our contribution to promoting biodiversity through the introduction of refuges for wildlife at new schemes and the planting of trees
- Create a sustainability strategy
- Build knowledge and understanding of carbon neutrality among staff, the board and residents
- Embrace new technology through trialing renewable energy sources where appropriate.
- Carry out an exercise to understand our carbon footprint.

4 | Measuring Success

The Board will monitor the strategic objectives annually against a clearly defined set of success measures:

DRIVER	SUCCESS MEASURE
PEOPLE	<ul style="list-style-type: none"> • Achieve a net promoter score of 50 or better • Achieve great places to work accreditation • Achieve 100% satisfaction with culture • Automated 20% of business processes • Achieve 100% staff with a relevant qualification • Achieve satisfaction with complaints handling of more than 80%
PROPERTY	<ul style="list-style-type: none"> • Achieve 100% satisfaction with damp and mould repairs • Divest to invest in 10% of stranded assets • Achieve 100% SHDF grant drawdown on Leigham Court • Gain access to 100% of all properties every year
PLACE	<ul style="list-style-type: none"> • Deliver 60 new homes at EPC A or equivalent • Build new offices in Plymouth • Achieve greater than 90% satisfaction with neighbourhood as a place to live • Start on site with one new mixed tenure land led scheme
PLANET	<ul style="list-style-type: none"> • Achieve carbon literacy accreditation • Plant one tree for every new home delivered • Publish a sustainability strategy • Reduce organisational carbon footprint by 25%



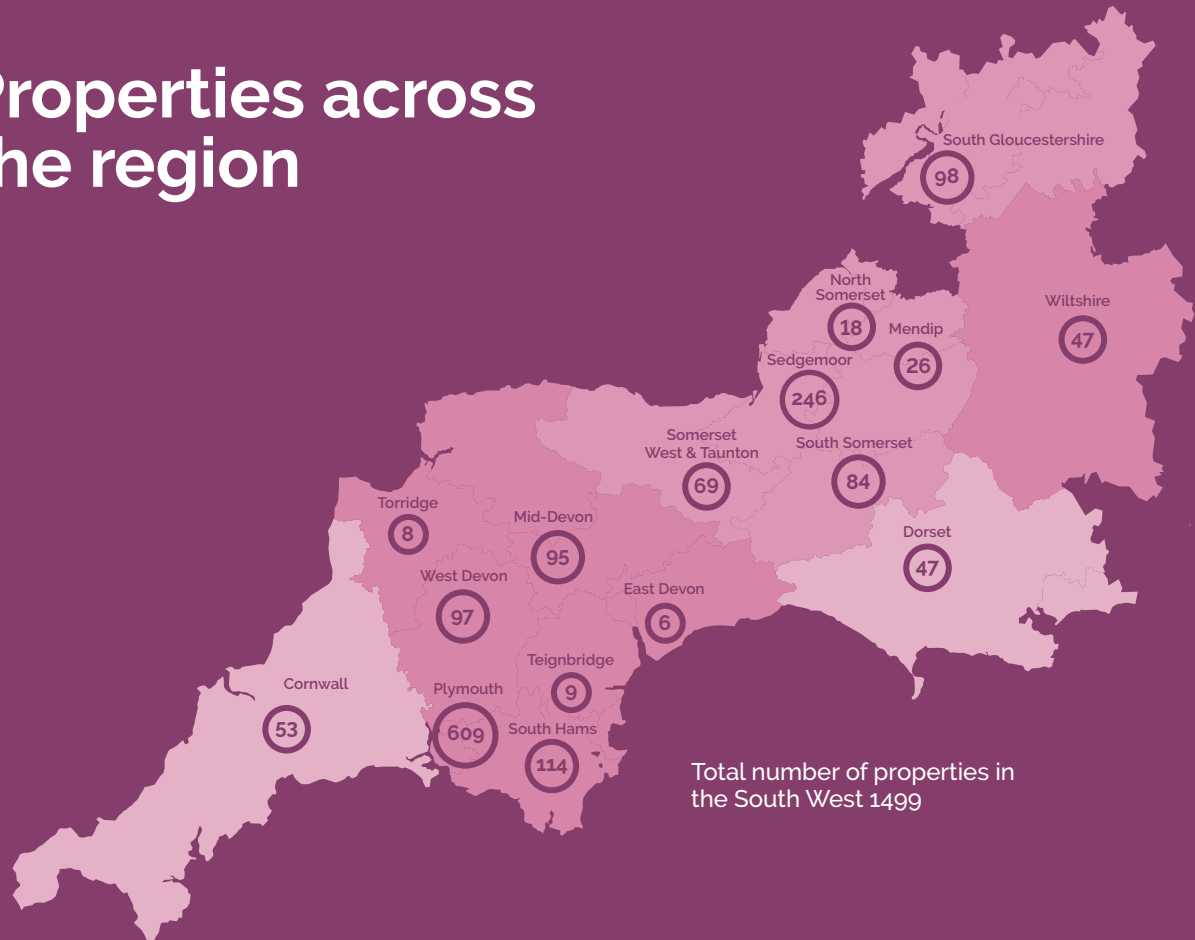
Supporting Strategies

This corporate strategy forms the basis of Willow Tree's aspirations and key goals for the next three years. It does not stand alone and WTHP ensures that there is a clear correlation between our corporate objectives and achieving them in a planned way that provides an effective audit trail. These are:

Asset management	ensuring that we invest in existing properties and that they are efficient to maintain for residents
Development	ensuring we are focused on what, where and how we grow to achieve sustainable communities
Sustainability	ensuring that we are focused on mitigating our climate change impact
Treasury	ensuring we utilise assets wisely in procuring new funding to build more homes
Risk management	ensuring we understand the challenges facing us and mitigating for them
Resident involvement	ensuring that we listen and deliver what matters most
Equality and Diversity	ensuring that we recognise and respond to the range of needs presented by different people
Knowledge & Information Management	ensuring our systems are equipped to be efficient, effective and add value
Workforce	ensuring we attract the best candidates and offer clear opportunities for existing colleagues to grow and develop
Communications	ensuring we tell our story and keep people informed appropriately



Properties across the region



Total number of properties in the South West 1499

SOMERSET OFFICE

Eastbridge House, Pill Road,
Rooksbridge
Somerset BS26 2TN

DEVON OFFICE

Studio 5-11, Millbay Road,
Plymouth
Devon PL1 3LF



WILLOW TREE
HOUSING PARTNERSHIP

Registered address: Eastbridge House, Pill Road, Rooksbridge, Somerset BS26 2TN

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