



ANNUAL REPORT

2023 | 2024



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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 YEAR WE SPENT £877,000 ON REPLACING KITCHENS, BATHROOMS AND HEATING SYSTEMS, ALONGSIDE OTHER COMPONENTS.
”

I am delighted to be writing my first foreword to our annual report as the new Chair of Willow Tree Housing Partnership Limited (WTHP). Though only having been here since September, I am already keenly aware of how passionately everyone in the organisation feels about delivering for our tenants and doing a good job. It has been a challenging year and one where we have held on to 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, when times are hard for everyone.

In spite of high inflation and significant increases in costs due to the economic environment, I am pleased to note our continued investment in existing homes. In this year we spent £877,000 on replacing kitchens, bathrooms and heating systems, alongside other components. We finished the lift replacement at Holyrood Court in Plymouth, and I offer my huge appreciation and thanks on behalf of the board, to our tenants there who exercised a great degree of patience and understanding while this significant piece of work was completed.

I am proud that we continue to build new homes that meet our mission, and we delivered 17 new homes in rural areas where there is a desperate shortage of accommodation for people with a strong connection to their place, but whose income falls way short of being able to afford a mortgage in the area. We delivered in Crapstone on the edge of the Dartmoor National Park, and in Somerset where affordable rural housing is in short supply.

Our turnover increased by £0.9m and the surplus was £0.3m; reversing the deficit reported last year that happened as a result of treasury costs involved with the merger between Tamar and

South Western Housing Societies. We remained compliant with our lending obligations and approved a business plan that supports a balance between development and investment in existing homes.

Health and safety and ensuring WTHP meets its landlord obligations, remains a priority for the board and I am assured to note that our compliance levels in this area were high, with just one gas certificate outstanding in the year and no high priority remedial works required on fire risk assessments undertaken.

The quality and safety of our homes is an area of our work that we intend to focus more on in the coming year, as we seek to ensure that nobody suffers because of the presence of damp and mould in their home or fails to thrive because they live in outdated or poorly maintained homes. I and the board will continue to promote actively listening to the voices of the people who live in the homes that we deliver services to.

I introduced this foreword acknowledging the passion of colleagues for their work; I conclude noting that we need to translate this into outcomes that increase how satisfied our tenants are with the service they receive from us. We exist to ensure that we engage positively and with empathy with our tenants, understanding that for them changing landlord is rarely an option; this makes it all the more essential that we ensure we are listening and delivering changes in our processes and procedures where needed to respond better to tenants. We will continue to strive to improve, and I look forward to playing my part in that for the next years to come.

SARAH O'NEILL
CHAIR

CEO's Introduction

In this our first year post-merger, we have been adapting to new challenges and preparing for changes to the regulatory framework that resets the focus on the absolute importance of good service outcomes for our tenants and residents. There has been some reorganisation of the internal operation, which has resulted in fewer managers and more front line roles. Our aim is to ensure that we can improve service delivery, in particular in relation to our repairs service moving forward.

The Willow Tree Housing Partnership's (WTHP) team has continued throughout the course of another challenging year, to push forward on being a landlord people can trust. Work has progressed with the setting up of our Resident Scrutiny Panel, who have created a plan for reviewing services that are important to them, starting with repairs. WTHP covers a wide geographic area, and it is testament to their commitment that the panel has embraced digital working and meeting virtually. This has helped to maintain involvement when it can be difficult or takes a long time for travel.

As well as resident scrutiny, our complaints policy and process has undergone an overhaul. Firstly, to ensure compliance with the Housing Ombudsman's Code, and secondly to ensure that we work to a culture of welcoming complaints as an opportunity to review our service, rather than being defensive when somebody is dissatisfied or unhappy. All colleagues received training, and we now have a board member responsible for complaints. I am certain that this will go some way towards ensuring we improve our satisfaction in this area.

We have worked with the board this year to make sure that we identify and act on any potential gaps there may be in our compliance, against the new regulatory community standards. We have put in

place plans to enhance our recording of the condition of our stock, how we manage empty homes and using our database more effectively to provide assurance on the work that we do, which will bear fruit as these plans are embedded.

Our sector has and will always, face a range of challenges and risks that we need to feel confident we are able to control and mitigate against. WTHP reviews both economic and strategic risks on a regular basis. This year the focus has been on cyber security and climate change. These two aspects of our operating environment have seen exponential increases to exposure and risk. A day doesn't seem to have gone by that a major cyber breach hasn't been identified, or an announcement made regarding the changing climate and the adverse impact it is having on food and farming or wildfires displacing hundreds of people from their homes. WTHP has put controls in place to strengthen our ability to withstand these pressures and remain committed to reviewing them regularly.

WTHP has always been committed to behaving sustainably and mitigating our impact on the environment. This past year has been no exception, with our last oil fired property being upgraded with renewable heating, a small but significant milestone for us. We disposed of two properties this year that were not viable to upgrade, and worked with our tenants where relevant, to acquire new homes that were much more efficient and economical to run. Every small change counts, and we will strive to make sure that we support this work so that current and future tenants can live in homes that are meeting a net zero carbon future wherever possible.

We look forward with fresh energy and commitment to delivering quality services in 2024 and beyond.

DONNA JOHNSON
CEO



Board Members



SARAH O'NEILL
Chair



CRAIG SULLIVAN
Vice Chair



SIMON HASKELL
Chair of Audit &
Risk Committee



SUE LANE
Chair of Remuneration & Nominations
Committee



WENDY LEWIS
Chair of Development
Committee



BRIAN WHITTAKER
Board Member



DEV BIDDLECOMBE
Board Member



STEPHEN BURTCHELL
Board Member



STEVE HAYES
Board Member



Executive Team



DONNA JOHNSON
CEO



CATHERINE DAVIES-GALLAGHER
Finance Director



SUE SPARKS
Head of Corporate Services



EMILY SHUTTLEWORTH
Housing Service Operations Lead

Our Staff

AGNES CIOFFI
Rent & Income
Management Officer

AMANDA WEBB
Business Support Team Leader

ANGELA DERRY
Shared Ownership &
Rentplus Officer

BILL FLEET
Interim Income
& Expenditure Officer

CADHLA GERAGHTY
Finance Manager

CLARE NORTON
Business Support Administrator

DAWN KIRBY
Property Team Leader

DEAN PILLAR
Property Inspector

DEBBIE JOHNSON
Tenancy Team Leader

DENISE NURSE
Housing Officer

DONNA GODDARD
Business Support Administrator

EMMA BENNEY
Housing Officer

HELEN TAMBLIN
Development Assistant

JANE EAGLING
Corporate Services Assistant

JANEY MATTHEWS
Income & Expenditure Officer

JEMMA BAILEY
Corporate Services Assistant

KAREN WALKER
Development Project Manager

KERRY WOOD
Rent & Income Management Officer

LIZ FARMER
Corporate Services Manager

MATT BULLOCK
Housing Officer

MICHAEL HARRY
Property Inspector

MOLLY RICHARDS
Income & Expenditure Officer

NEIL BUCKLAND
Asset Manager

RIA GILLINGS
Development Project Officer

ROXANNE SWEETING
Housing Officer

SARAH PURDY
Business Support Administrator

TRACY COX
Business Support Administrator

WILL LLOYD-JONES
Financial Controller



Post-Merger

On 31 March 2023 two organisations became one. Willow Tree Housing Partnership (WTHP) had been working in a strategic partnership for 3 years prior to this, but it still felt different, and we celebrated with all of our partners, stakeholders, and tenants. It was important to be mindful that as merger happens, organisational culture and the way we deliver our service should be uppermost in our minds at all times.

We have received our first Tenant Satisfaction Measures (TSMs) results, and they are not where we would wish them to be. They indicate that as yet our tenants have not felt the benefits of the merger and, so we must now work to ensure that we focus on understanding, and improving this perception as we move forward. The first year after merger has also required us to work more closely with the Regulator for Social Housing (RSH), and we looked forward to the introduction of the Social Housing Act, which enhances the RSH powers to inspect housing providers. By the time this report lands, WTHP will have undergone its first ever regulatory inspection. The outcome of this will help to inform our strategic planning post-merger, into the next 10 years.

Acquisitions & Disposals

Here at Willow Tree Housing Partnership (WTHP) we continually assess our homes to ensure they are performing at the required standard, and remain safe and affordable for our residents. During the period of 2023/2024 we identified two properties which were no longer performing at their best.

These properties, both located in the centre of Plymouth, were occupied. WTHP worked closely with the residents, supporting them to move to newer and better performing accommodation, before disposing of the older properties. The houses were put to auction with Auction House and successfully sold.

Disposal of properties is not WTHP's favoured option, and is only considered when it is deemed unviable to bring the property up to EPC C requirements, or to carry out major repairs. The funds from disposals are used to help purchase new, high performing, properties which are more energy efficient and affordable for residents to live in.

Over the 2023/2024 period, we also acquired six new properties. Two were Rentplus properties at Sparkwell and one at Plympton, which are only 5 years old. They are beautiful homes, in a great location and have been added to the existing WTHP rental stock on the site. These were converted to affordable rent units and quickly re-let to residents who met the local connection criteria. WTHP also had the opportunity to buy back a flat in Holyrood Court from a leaseholder. This was a strategic purchase,

which resulted in WTHP owning the entire block, strengthening our position in the future should upgrade work be needed. This property was successfully purchased and converted into a social rented unit.

Finally, WTHP acquired a 3-bed property from the open market, which was less than 2 years old. The flat is at the PL2 site in Plymouth, adding to our existing stock of properties there. This property was successfully let on a social rent tenure.



Developments

BURNT HOUSE FARM, NORTH NEWTON

Willow Tree Housing Partnership (WTHP) were extremely pleased to take handover of the two 3 bed affordable rent homes in North Newton, that have provided much needed affordable homes within the village, where there is limited new development. The homes, constructed by local developer Gadds Properties, have been built to a very high standard and to the same design as the adjacent open market properties within the scheme. The properties incorporated air source heat pumps and electric vehicle (EV) charging points.

Whilst North Newton falls within the larger area of North Petherton, these homes were governed by a local connection to the village of North Newton itself. WTHP were keen to provide a donation to a local charity that offers a service to the village, and Little Steps Pre School provides childcare right in the centre of North Newton, opposite the Primary School, with an emphasis on learning through play. We were delighted to visit the pre-school to present the cheque of £200 in early May, which the pre-school is excited to spend on a new painting easel.

Donna Johnson said "Willow Tree is passionate about not just building homes but contributing to the community as well. To that end we are delighted that our donation to the Little Steps Pre School at North Newton will help the team to purchase new toys and equipment for the children, who clearly enjoy themselves there, if the evidence of our visit is anything to go by."

BELOW: Three bedroom properties at Burnt House Farm, North Newton



TOP: Our tenant receives a gift on taking the keys to her new home at Crapstone

BOTTOM: Cheque presentation at Little Steps Pre-School

THE MEADOWS, CRAPSTONE

Following delays due to the combination of inclement weather and labour shortages, handover of the 8 new affordable homes on the edge of Dartmoor National Park, took place on 21st April 2023. The mix of 1 and 2 bed apartments, along with 2 and 3 bed houses, are the products of an excellent collaboration between WTHP, Classic Builders and West Devon Borough Council.

On advertising the homes on Devon Home Choice, a significant amount of interest was received, with all affordable rent properties being allocated to those with a local connection. Both shared ownership homes were also sold to people with a strong connection to the local area, with the help of Lang Town and Country based in Plymouth.

Despite the delays, Classic Builders worked hard to complete these homes to a high standard, which were officially opened at a well-attended opening event on 26th April 2023.



BATTS MEADOW, NORTH PETHERTON

Willow Tree Housing Partnership (WTHP) have been delighted to work with Otter Construct again, in the delivery of seven affordable homes at Batts Meadow.

All semi-detached houses, the scheme provides five affordable rent and two shared ownership homes, to meet the much-needed demand in the village of North Petherton, Somerset. WTHP is dedicated to providing safe and comfortable affordable homes to people who are not in a position to access the housing market, helping them to remain in areas where they have strong local connections.

The homes form part of a wider development of 33 homes which have been built with the environment in mind, incorporating solar PV, air source heat pumps, EV charging points and underfloor heating that will benefit future occupiers. In addition, wildlife features including hedgehog highways, swift boxes and bee blocks have been included in gardens, which are new features for WTHP's housing stock.

Donna Johnson WTHP CEO commented "It's really important to Somerset that smaller organisations work with small and medium sized builders to help contribute to keeping a thriving local economy. This is Willow Tree's

second venture with Otter Construct and the homes have again been finished to a very high standard."

"This year we moved into our new home. We no longer have to share a bedroom with our daughter and the additional space to live comfortably is a God send. The house layout and build quality is exceptional. We never could have imagined living in a home this beautiful and it's difficult to put into words what this means to our family. We are very grateful to Willow Tree Housing Partnership."

SUZIE FROM BATTS MEADOW

Works commenced on site in Autumn 2022 and the homes were handed over in February and March 2024. The official opening of the homes was attended by local Councillors, dignitaries, new residents and other individuals, who all played a part in bringing the scheme forward. Bill Revans, Leader of Somerset Council, who cut the ribbon to officially open the new homes, said **"It's great to have seven new affordable houses here in North Petherton. We see a huge new demand for affordable housing in North Petherton. The local need is absolutely significant."**

FUTURE SCHEMES

WTHP are excited to be looking at other opportunities with local developers; contracts are currently being prepared for another site near Ilminster for 2 shared ownership and 3 affordable rent homes. Again, incorporating air source heat pumps, solar panels, battery storage and EV charging points, we aim to make these homes as affordable to run as possible. Work is already underway on site, with an anticipated completion of March 2025.

Work is also taking place on a site within South Hams for another 5 affordable homes and the preparation of contracts is underway. Being built in a small village between Ashburton and Totnes, these affordable homes will provide much needed affordable housing in a sought after, high value area.

Further pipeline schemes are also being considered in Devon and Somerset.



WE AIM TO MAKE THESE HOMES AS AFFORDABLE TO RUN AS POSSIBLE, INCLUDING INSTALLING EV CHARGING POINTS.



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 (WTHP) 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.

- Found that 64% of tenants are satisfied with the repairs service provided by WTHP over the last 12 months
- On average it took 17.1 days end to end to complete a responsive repair
- We have achieved 100% on our 10 year electrical testing programme and 92.73% on the 5 year electrical testing programme on our homes
- Have undertaken 92 stock conditions surveys overall in the period until March 2024.
- Of our housing stock units (excluding Rentplus) 23% are registered as EPC D or lower
- During the year there were:
 - 84 Gas boiler replacements
 - 23 Kitchen replacements
 - 48 Bathroom replacements

- 39 Electrical heating upgrades
- 3 Fire alarm system upgrades
- 3 Fire door replacements
- 5 Air source heat pump replacements
- 1 Roof replacement
- 1 Lift replacement
- 1 Oil heating converted to renewables
- We supported 5 local authorities disabled facilities grants and completed 10 adaptations for tenants

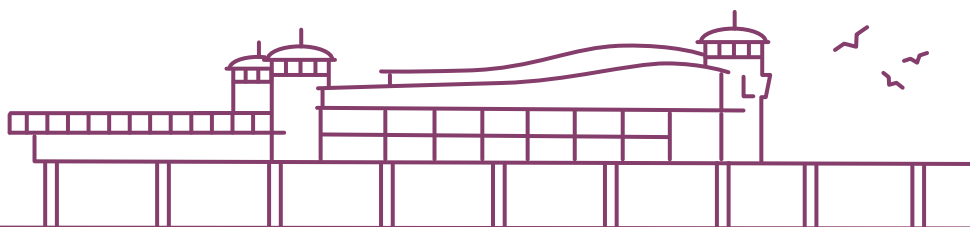
TENANCY STANDARD

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 53 re-lets during the year 2023/24 with an average turnaround time of 22.3 days
- There were a total of 17 new properties onboarded which were a mix of shared ownership and affordable rent including:
 - 8 homes in Crapstone in Dartmoor National Park – 2 shared ownership and 6 affordable rent homes
 - 2 affordable rent homes in North Newtown Somerset
 - North Petherton Somerset - 2 shared ownership and 5 affordable rent homes
- There were no evictions during the year 2023/24



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 antisocial behaviour.

- The Housing Team dealt with 31 cases of anti-social behaviour
- Ensuring that 100% of residents are contacted and visited by Willow Tree Housing Partnership (WTHP) or their representatives during the course of the year is a continued priority
- All Operations Staff undertook DAHA (Domestic Abuse Housing Alliance) training

- There was ongoing proactive community engagement and partnership working with Local Authority, Social Services, Policing and other partners to ensure our residents are able to enjoy their homes
- WTHP made donations of £1,675 to various charities and community groups
- £9,936 of funding was paid to support residents who were in need of support through our Hardship Fund

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.

- There were 64 Stage 1 Complaints received, 23 escalated to Stage 2 and 2 Stage 3 complaints
- There was 1 Housing Ombudsman investigation that found WTHP acted with discretion, empathy and consideration when dealing with a vulnerable tenant
- All complaints were acknowledged and responded to within the timelines set out in the Housing Ombudsman's Code of Conduct
- There were 8 disrepair claims received
- The first set of Tenant Satisfaction Measures surveys were undertaken by Acuity by post and online surveys
- A new Resident Engagement Strategy was published
- 8 interested tenants applied and joined the Resident Scrutiny Panel
- We joined TPAS (Tenant Participation Advisory Service) to provide support and guidance in our tenant engagement services



Removal of Oil Heating Systems from Portfolio

We completed the final phase of the Stoke Fleming project to remove oil heating from the scheme, this followed the previous works to convert 10 properties from oil to renewable heating. The communal oil tanks were therefore decommissioned and removed, with the remaining oil pipework infrastructure being isolated.

Removal of oil heating and installation of an air source heat pump system was carried out to a property in Church Lane at Calstock.

We are pleased that there are no longer any oil heating systems in our properties, and this continues to demonstrate our commitment to working towards provision of sustainable homes. The installation of renewable energy systems and technologies is very much part of our asset management strategy as to how we can improve and develop our properties.



HEATING AN AVERAGE HOME USING OIL EMITS 5,200KG OF CARBON A YEAR. THAT'S MORE THAN 2 RETURN FLIGHTS FROM LONDON TO NEW YORK. HEAT PUMPS GENERATE ONLY 850KG OF CARBON PER YEAR.

Component Replacements

Our programme with MSB Property Services on the replacement of bathrooms, kitchens and electric heating, has continued well. For the renewal of gas boilers, this work is being carried out by Gregor Heating. The quality of work from our contractors is to a good standard and they work well in collaboration with our tenants whilst these planned works are being done.





Stock Condition Surveys

Haldons (Construction Consultants) surveyed approximately 90 properties within Plymouth this year. The information obtained from the stock condition surveys will help to inform the future investment requirements in our homes. change to Willow Tree Housing Partnership (WTHP) is committed to ensuring all properties have this type of survey carried out within a five year rolling programme, which is integral to the asset management strategy, ongoing component replacement and other statutory compliance projects. There is focus from the Regulator of Social Housing to ensure that housing providers know the condition of their stock well and that it continues to meet the Decent Homes Standards.



Fire Alarms and Fire Door Replacements

During the year, Trelawney Fire and Security continued with the replacement of fire alarm systems to several blocks of flats at three schemes, including the commencement of works at Leigham Court. In respect of fire door replacements, the rolling project continued and there were also some works carried out for us by Jones Building Group at Cambridge Court.

IN BRIEF

Replacement of Decking

Extensive work to replace decking at Fort View in Saltash was completed by Garry Roles, which will allow Bell Group to do render repairs and external decorating work to this scheme in 2024-2025.

External Decorating

Bell Group commenced a programme of external decorating works involving redecoration of render to the bungalows at Bridgewater Gardens in Totnes, which was successfully completed. The contractor then started work at Glovers Close at Stoke-sub-Hambdon.

At Stafford Court in Totnes, Bell Group also carried out external repairs and decoration of joinery.

Disabled Facilities Grants

WTHP continued to be approached by Local Authorities for permission to be given for Disabled Facilities Grants works to be carried out. Approvals were given for five level access showers, two mobility ceiling hoists and three stair chair lifts. In respect of aids and adaptations, we supported our tenants in the provision of various items and smaller works to enable them to have increased accessibility and mobility within their homes.

Tenant Satisfaction Measures

Tenant Satisfaction Measures (TSMs) were introduced in April 2023, to assess how well social landlords in England and Wales are doing at providing quality homes and services.

Landlords with 1,000 or more homes must submit their TSM data annually to the Regulator of Social Housing, and publish in a manner that is timely, clear, and easily accessed by tenants.

The Tenant Satisfaction Measures reported below show our end of year performance (April 2023 – March 2024). There are 12 tenant perception questions which cover several areas such as overall satisfaction and how safe people feel in their homes, and these results are captured through a customer feedback survey

which completed on our behalf by a market research company called Acuity.

Alongside these, there are 10 technical performance measures covering things like building safety, repairs, complaints and anti-social behaviour. This information comes from our internal data management systems.

This information will be used to focus on service delivery improvements for tenants within our landlord services.

TENANT SATISFACTION MEASURES



70%

Taking everything into account, how satisfied are you with the service provided by your landlord?



64%

Has your landlord carried out a repair to your home in the last 12 months? How satisfied are you with the overall repairs service from your landlord?



63%

Has your landlord carried out a repair to your home in the last 12 months? How satisfied are you with the time taken to complete your repair after you reported it?



66%

How satisfied are you that your landlord provides a home that is well-maintained?



75%

Thinking about the condition of the property or building you live in, how satisfied or dissatisfied are you that your landlord provides a home that is safe?



69%

How satisfied are you that your landlord listens to your views and acts upon them?



66%

How satisfied are you that your landlord keeps you informed about things that matter to you?



73%

To what extent do you agree with the following? 'My landlord treats me fairly and with respect.'



34%

Have you made a complaint to your landlord in the last 12 months? IF YES - how satisfied are you with your landlord's approach to complaints handling?



57%

Do you live in a building with communal areas, either inside or out, that your landlord is responsible for maintaining? How satisfied are you that they keep these areas well maintained?



46%

How satisfied are you that your landlord makes a positive contribution to your neighbourhood?



43%

How satisfied are you with your landlord's approach to handling anti-social behaviour?

Complaints

LEARNING FROM COMPLAINTS

Landlords across the social housing sector have experienced an increase in complaints received, and Willow Tree Housing Partnership (WTHP) is no exception to this. The staff team worked extremely hard this year to focus on improving our approach to complaints and embedding a positive complaints culture, taking learnings from complaints to improve service delivery.

A few examples include:

- With the increase in reports of damp, mould and condensation in homes, WTHP have taken a proactive approach to supporting residents. This includes holistic full house reviews to identify root cause issues, invasive surveys by RICS surveyors and increased training for our staff.

We have also introduced gifting dehumidifiers and hygrometers to our residents to use in their homes; hygrometers measure humidity in homes which then acts as a reminder to residents to ventilate rooms.

- Introduced a clearer and simpler way to report complaints via our website, and recategorised our complaints policy for clarity and to ensure appropriate management of complaints.
- Introduced single point of contact for the management of complaints, and trackers to ensure outstanding works are completed appropriately.

COMPLAINTS CASE STUDY

A Complaint Panel reviewed a complaint raised about communication, in relation to a passenger lift at one of our schemes being out of operation for a considerable period, impacting on the resident's ability to access and leave their home.

The complaint centred around timely communication, managing expectations and accurate record keeping.

COMPLAINTS RECEIVED – YEAR TO 31 MARCH 2024:

STAGE	Complaints Logged
Stage 1	64
Stage 2	23
Stage 3	2
MP/Councillor Enquires	4
Housing Ombudsman enquiries including 1 investigation	4

It was accepted that a lift being out of service due to upgrade works clearly impacted the tenant's ability to access the outside world.

That file notes of key conversations were not made to the housing management system which resulted in expectations not being appropriately managed.

The panel found that listening and understanding the individual circumstances of tenants should have been approached in

a better way, to ensure that impact to tenants is understood. It was also clear that record keeping needed to be improved.

The learning from this complaint has resulted in the staff team speaking to our tenants more (instead of an over reliance on email), at all levels to truly understand impact and ensure individual needs are considered.

Also, ongoing training has been undertaken throughout the year, to remind our staff of the importance of documentation and record keeping of all resident interactions.

THEMES & TRENDS THAT COMPLAINTS RECEIVED RELATED TO INCLUDED:

CATEGORY	Volume
Outstanding Repairs	16
Time Take to Complete	13
Communication	11
Damp & Mould	11
Property Damage	4
Heating	3
Contractor Behaviour	2
Rent Issue	1
Garden Maintenance	1
Staff Attitude	1
ASB Process	1
Total	64

TENANT SATISFACTION MEASURES



100%

Proportion of homes for which all required fire risk assessments have been carried out



100%

Proportion of homes for which all required lift safety checks have been carried out



91%

Proportion of homes which all required asbestos management surveys or re-inspections have been carried out



99.9%

Proportion of homes for which all gas safety checks have been carried out



100%

Proportion of homes for which all required legionella risk assessments have been carried out



21%

Number of anti-social behaviour cases opened per 1,000 homes. Total of 31 ASB cases reported



85.4%

Proportion of non-emergency responsive repairs completed within landlord's target timescale*



76.9%

Proportion of emergency responsive repairs completed within the landlord's target timescale.**

*Timeline for non-emergency repairs is to be completed in 28 days
**Timeline for emergency repairs to be attended is 24 hours

Resident Scrutiny Panel

In September 2023, Willow Tree Housing Partnership (WTHP) held the inaugural meeting of the Resident Scrutiny Panel. This was attended by 8 residents, who all showed an interest in wanting to become involved in the delivery of their landlords' services.

The panel meet quarterly to discuss various policy documents and to give feedback on key areas of concern such as complaints or repairs delivery. Going forward they will be undertaking scrutiny projects and will develop ideas for service improvement.

The Panel have been supported by TPAS (Tenant Participation Advisory Service) who have been helping with scoping out scrutiny projects and in the provision of training.

Future opportunities the panel will be involved in are:

- Procurement of contractors for service delivery
- Staff recruitment
- Undertaking training and upskilling – to aid them in their role
- Attendance at national housing sector conferences to network with other tenants
- Estate walkabouts
- Reviewing complaints – establishing the root cause of issues and how they were resolved
- Reviewing policy and strategy
- Feeding back to WTHP on lived experience as a tenant

If you would like to find out more about getting involved with the WTHP Resident Scrutiny Panel or would like to become involved in providing feedback or one-off focus groups, there are ways for everyone to link in. Please contact Customer Services who will provide more information on opportunities available – customerservices@willowtreehousing.org.uk



GARY MARLTON
Resident Scrutiny
Panel Member

How long have you been a tenant of WTHP and where in the Country do you live?

I've been a tenant of WTHP for 21 years, starting off with Tamar Housing Society prior to the merger. I actually lived in another flat above me when I first moved but have remained living in the same block. I live in Plymouth very close to The Hoe.

What do you enjoy about where you live?

I enjoy where I live because of the views of the water, I can see boats coming and going. I live very close to the The Hoe and enjoy going down there to read books in the summer. It's very accessible to me being a wheelchair user and the City centre is only 10 minutes away.

Why did you want to join the Resident Scrutiny Panel?

I've been a tenant for many years and have been involved in other resident groups in the past, though they always felt like we weren't really getting anywhere.

In the past, I've noticed that other tenants talk about issues but don't actually take any action to try and resolve them. I felt that I wanted to find a way of being able to put my views across and with my background in Advocacy, felt I had the skills to be able to do this in a constructive way. I also find it interesting to understand how work is being done across the whole organisation and how it is affecting tenants in different areas.

What has been your experience so far?

The group still feels quite new but already I feel as though members are being listened to and valued. All members have had a variety of experiences with WTHP as their landlord. A few of us recently attended a complaints overview meeting at the Plymouth office and it was a really positive morning, where we came together with staff and discussed some complaints case studies. I look forward to getting more stuck in over the coming months.



DAN MILNER
Chair of Resident
Scrutiny Panel

How long have you been a tenant of WTHP and where in the Country do you live?

I live in Mid Devon in Cullompton. My home was one of the last South Western Housing Society developments before the merger. I have lived there for 7 years.

What do you enjoy about where you live?

I have to be honest, we are not overly keen with the town we live in, but love our house! The house and having WTHP as our landlords is our sole reason for not moving!

Why did you want to join the Resident Scrutiny Panel?

It is a very strong belief of mine, that you have no right to moan if you are not willing to try and help or affect things in the best way you can. This based on the old fashioned, if you don't vote, you have no right to moan. It's not that we've had any issues as such, but that getting involved would give me more of a collective voice to make positive change where needed.

What has been your experience so far?

So far it's been nothing but positive! While residents may not have seen or heard anything specific yet, I know that the panel will make a difference in the future for WTHP and it's tenants. WTHP have shown they are willing to listen and to work towards improving on all levels.

RIGHT: Brandon Noonan a member of the Resident Scrutiny Panel 



BRANDON NOONAN
Resident Scrutiny
Panel Member

How long have you been a tenant of WTHP and where in the Country do you live?

I've been a tenant for almost a year and a half, before that I was homeless for a year. I live in Plymouth.

What do you enjoy about where you live?

I love living in Plymouth because it has a nice mix of being in the city, but being near countryside and the coast. I've spent quite a lot of money on my flat making it a home. Although I don't have any private outdoor space; we do have a communal garden that I enjoy with my neighbours. We have enjoyed some social BBQ's together in the summer. I think I have a good landlord and the only downside to my flat is that it's quite small and there isn't a lot of storage.

Why did you want to join the Resident Scrutiny Panel?

I believe that I'm good at bringing communities together from the work that I have independently done as a public figure in the past, where I organised and ran free community fun days alongside various businesses in Plymouth. I also established the biggest houseplant giveaway in Plymouth on Facebook during the Covid pandemic.

I wanted to demonstrate the importance of equality and diversity in a resident engagement group.

What has been your experience so far?

My experience of being a member of the panel has been positive so far, it has been good to listen to other tenants' experiences, opinions and perspectives. To understand that just because an issue doesn't affect me, it doesn't mean that it isn't affecting someone else who is a tenant. It allows me to see the broader picture of what is happening across the board for all tenants.





Good News Stories

Our Shared Ownership & Rentplus Officer supported a family who moved into a 2 bedroom flat in the Okehampton area of Devon. They had a young child who was under the age of one and were struggling to afford to carpet their home due to this being their first home and having to buy other essential items. The property was then carpeted using the Willow Tree Housing Partnership (WTHP) Hardship Fund.

"I just wanted to say again a massive, massive thank you for getting the carpet approved for us we really appreciate the effort you went through to get this approved for us."

One of our Housing Officers and Rent and Income Management Officers, jointly supported a resident with an Outright Possession Order, to remain in their home. WTHP signposted the resident to Benefit Agencies who assessed their circumstances. They discovered the resident had an unclaimed entitlement that increased their household income; a payment plan was put in place for the arrears. In addition, a household member was also entitled to unclaimed benefit which increased the household income further.

One of our Rent & Income Management Officers was able to signpost an elderly resident to apply for pension credit. This means he can claim full housing benefit and will no longer be subject to a housing benefit shortfall, making life a little easier.

Three of our residents, who responded to a WTHP Tenant Satisfaction Survey, were the lucky winners of a £50.00 Amazon voucher.

You Said, We Did

RESIDENTS REPORTED ISSUES WITH WINDOW MECHANISMS THAT HAD SEIZED AND WERE EXTREMELY STIFF TO OPEN

We instructed a new supplier, Resolve Doors and Windows, to overhaul the windows by doing works to handles and lubricating mechanisms to ensure the windows are in full working order

RESIDENTS REPORT CONDENSATION ISSUES LINKED TO HUMIDITY IN HOMES

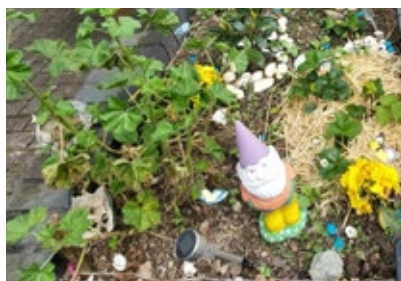
We are providing hygrometer humidity monitors which act as visual reminders to tenants to ventilate rooms by using fans or opening windows and so reduce condensation build up

DURING WINTER MONTHS SOME RESIDENTS STRUGGLE DRYING CLOTHES IN THEIR HOMES, HAVING AN IMPACT ON INCREASING HUMIDITY, DAMP, MOULD AND CONDENSATION

We have provided some residents with 12 litre portable dehumidifiers which helps to dry clothes more quickly. They are more cost effective to run than a tumble drier and they reduce the moisture in the air as opposed to using central heating radiators to dry clothes, which can lead to damp or mould issues longer term

RESIDENTS HAVE BEEN REQUESTING ACCESS TO HIGH SPEED BROADBAND

We have had board approval to sign wayleave agreements with providers, to facilitate the installation of fibre broadband in homes. We will be working with CityFibre, based in Plymouth, to support the installation of broadband for residents who have signed up.



RentPlus

Rentplus offers people aspiring to homeownership but unable to save for a deposit because of high rent costs, a real chance to own their own home. Residents rent for an agreed initial period of either 5, 10, 15 or 20 years at an affordable rent which allows them some leeway in their finances to save for a deposit. At the end of that time, they buy the property with a 10% gifted deposit from Rentplus. This support at all stages of the process, makes homeownership a realistic prospect for people who only saw it as a dream before.

So far, 22 individuals and families have become homeowners through the Rentplus scheme. A further 3 properties have been bought by Willow Tree Housing Partnership (WTHP) when the residents did not take up the option to buy, so they have been retained as affordable housing for local people.

Of course, not everything always goes to plan. There have been instances when residents who are due to buy, face the prospect of losing their home as they are not in the position they expected, and need a little more time. In most of these situations we have been able to use the opportunity to offer other residents on longer agreed periods, the option to buy early. In these cases, everyone remains in their own home, but the extra years are swapped from one property to another allowing one household to become homeowners sooner than planned, and others to have the extra time they need – good news all round! So far 12 households have benefitted from this process.

Gardening Project at Boxhill Close

Willow Tree Housing Partnership (WTHP) pledged £350 towards a gardening project at Boxhill Close which has been led by Natalie Harrison – community builder from Four Greens. Some WTHP residents, their children and children from the local community were involved with creating a fairy garden, wildlife bed, wildflower meadow with poppies and cornflowers and fruit bed with apple, pear, plum and cherry trees.

A broken children's tent was repurposed to create a scarecrow and charity shop items were used to create the other garden areas. Strawberries and blackberries were planted along with chocolate cosmos.



LEFT: Emma Benney Housing Officer presenting cheque to Four Green Community Trust.

REMAINING PHOTOS: Progress at gardening project Boxhill Close.

HOUSING STOCK	Tenure
General Needs Housing (Social, Secure and Affordable Housing)	1,181
Shared Ownership	102
Rentplus Housing	213
Leasehold	4
Total (as of 31 March 2024)	1,500

In the year ending 31 March 2024 we let 1500 properties

COMPONENT REPLACEMENT

COMPONENT	Number replaced	Expenditure (£K)
Roofs	1	14
Kitchens	23	159
Bathrooms	48	229
Electric heating	39	131
Gas boilers	84	281
Oil heating converted to renewables	1	11
Renewable heating systems	5	44
Lifts (completion and commissioning of the Holyrood Court lift (works started in prior year))	1	8
Total	202	877
Communal Assets		
Fire Alarms		52
Fire Doors		29
Total		958

Willow Tree Housing Partnership's Commitment to Fire Safety

We take all elements of fire safety within our homes and associated areas very seriously. We are responsible for communal areas in blocks of flats including walkways, foyers and stairwells. Our Housing Management Team carry out regular inspections and visually inspect to ensure that areas are safe and secure for our residents, including checking fire doors. On top of these inspections, we procure specialist contractors to complete other inspections on our behalf such as Fire Risk Assessments and checks to fire and smoke alarms. Health and Safety within our homes are a shared responsibility between us and our residents.

SOME OF THE WAYS OUR RESIDENTS CAN ASSIST US WITH KEEPING AREAS SAFE ARE:

- Keeping fire escape routes clear, so that they aren't blocked.
- Never propping a fire door open.
- Not using landings as storage spaces for personal items such as plants or door mats.
- Not storing items such as prams, bikes or mobility scooters in communal areas.
- Not placing flammable items in cupboards that have electrics in them and not plugging electrical items into sockets in communal areas.
- Placing rubbish outside in the bins, instead of in communal areas.
- Advising Housing Officers or Customer Services if they see any of the above happening, so that we can help rectify the issue.

Performance Indicators

INDICATOR	Year End 2024	Year End 2023
Current tenant arrears		
• Owned rental properties	4.26%	4.43%
• Shared ownership	2.22%	3.30%
• Rentplus managed properties	2.28%	2.37%
Lettings end to end time for voids (Average days)	22.3	19.3
Repairs end to end time (days)	171	12.9
Number of repairs undertaken	3,299	3,443
Gas Safety	99.9%	99.9%
Electrical Safety 5 year programme	92.73%	82.9%

VALUE FOR MONEY METRICS	2023/24	2022/23
Reinvestment	2.38%	2.48%
New supply delivered - social housing units	1.13%	0.16%
Gearing	28.01%	27.10%
Earnings before interest, tax, depreciation, amortisation, major repairs included (EBITDA MRI) interest cover	125%	60%
Earnings before interest, tax, depreciation, amortisation, major repairs included (EBITDA MRI) interest cover (excluding impact of the Dexia loan break costs)	N/A	118%
Headline social housing cost per unit	£4,721	£4,482*
Operating margin		
• Social Housing lettings only	18.03%	21.13%*
• Overall	17.46%	16.83%*
Return on capital employed (ROCE)	2.06%	2.11%

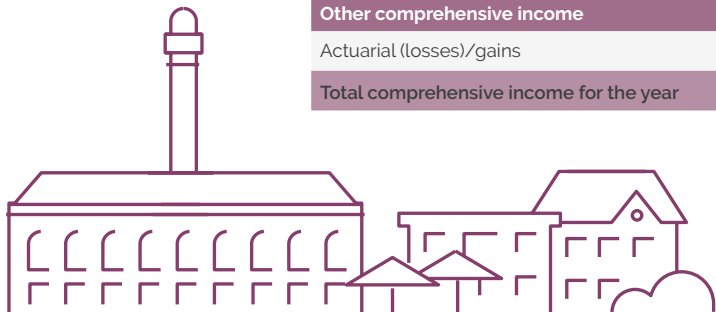
*Restated for re-classifications.



Statement of Comprehensive Income

FOR THE YEAR ENDED 31 MARCH 2024

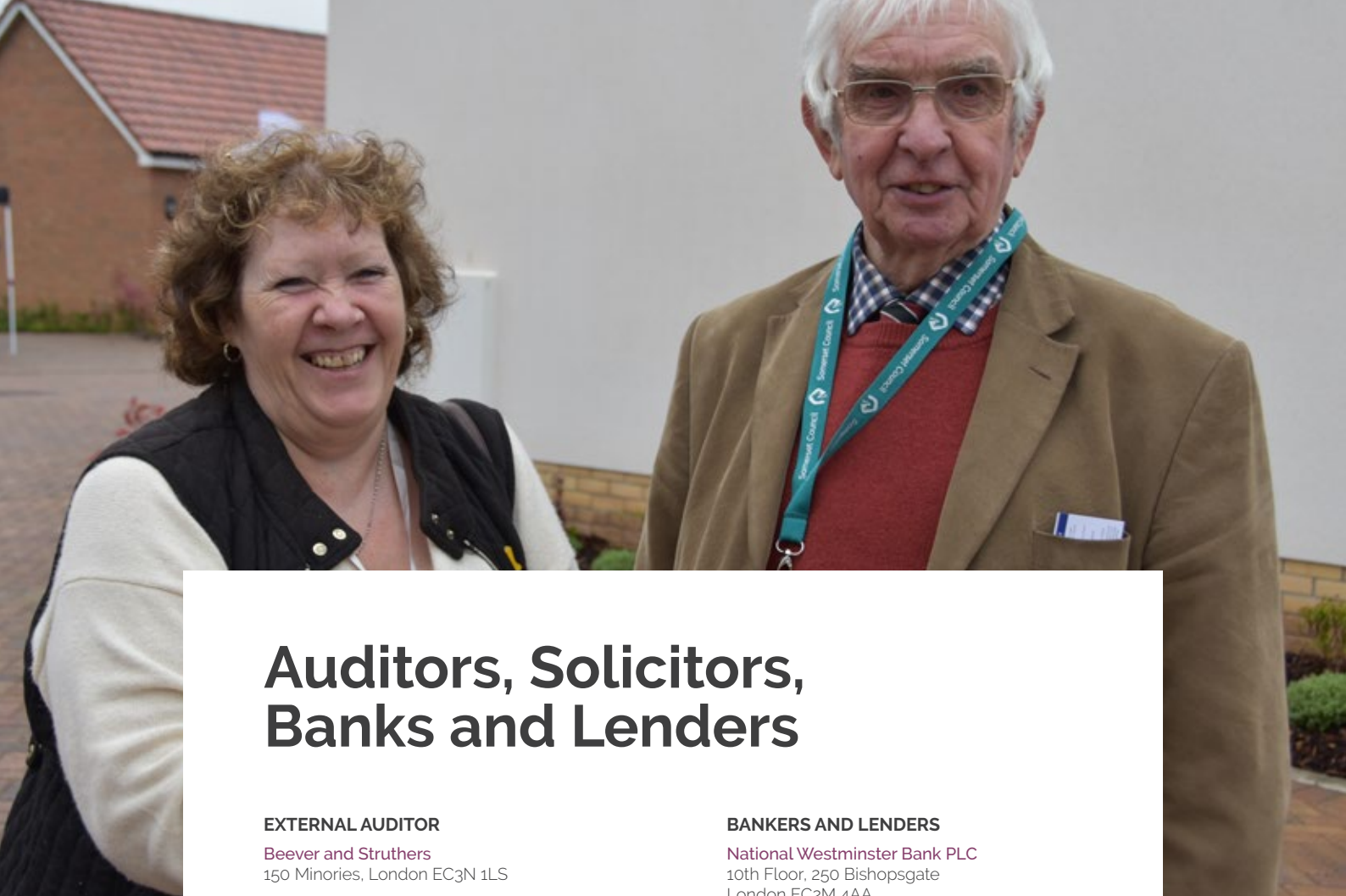
FOR THE YEAR ENDED	2024 £'000	2023 £'000
Turnover	9,737	8,871
Cost of sales	(335)	(71)
Operating costs	(7,702)	(7,307)
Surplus on the sale of housing properties	210	449
Operating surplus	1,910	1,942
Other income	-	6
Interest receivable	73	25
Interest and financing charges	(1,570)	(2,583)
Surplus/(Deficit) for the financial year	413	(610)
Other comprehensive income		
Actuarial (losses)/gains	(123)	(96)
Total comprehensive income for the year	290	(706)



Statement of Financial Position

AS AT 31 MARCH 2024

FOR THE YEAR ENDED	2024 £'000	2023 £'000
Fixed Assets		
Intangible assets	59	91
Tangible fixed assets - housing properties	90,739	88,671
Tangible fixed assets - other	726	717
Investments	260	260
	91,784	89,739
Current Assets		
Properties for sale	38	-
Stock	-	177
Debtors – due in one year	762	812
Cash at bank and in hand	2,718	4,167
	3,518	5,156
Creditors		
Amounts falling due within one year	(2,793)	(2,730)
Net current assets	725	2,426
Total assets less current liabilities	92,509	92,165
Creditors		
Amounts falling due after one year	(52,822)	(52,840)
Provisions for liabilities	(611)	(549)
Net Assets Excluding Pension Liability	39,076	38,776
Defined benefit pension liability	(626)	(616)
Net Assets	38,450	38,160
Capital and Reserves		
Share capital	-	-
Income and expenditure reserve	31,082	30,792
Revaluation reserve	7,368	7,368
WTHP's Funds	38,450	38,160



Auditors, Solicitors, Banks and Lenders

EXTERNAL AUDITOR

Beever and Struthers
150 Minories, London EC3N 1LS

PRINCIPAL SOLICITORS

Tozers LLP
Broadwalk House, Southernhay West
Exeter, Devon EX1 1UA

Foot Anstey LLP
Salt Quay House, 4 North East Quay
Sutton Harbour
Plymouth PL4 0BN

Capsticks Solicitors LLP
Staple House, Staple Gardens
Winchester, Hampshire SO23 8SR

BANKERS AND LENDERS

National Westminster Bank PLC
10th Floor, 250 Bishopsgate
London EC2M 4AA

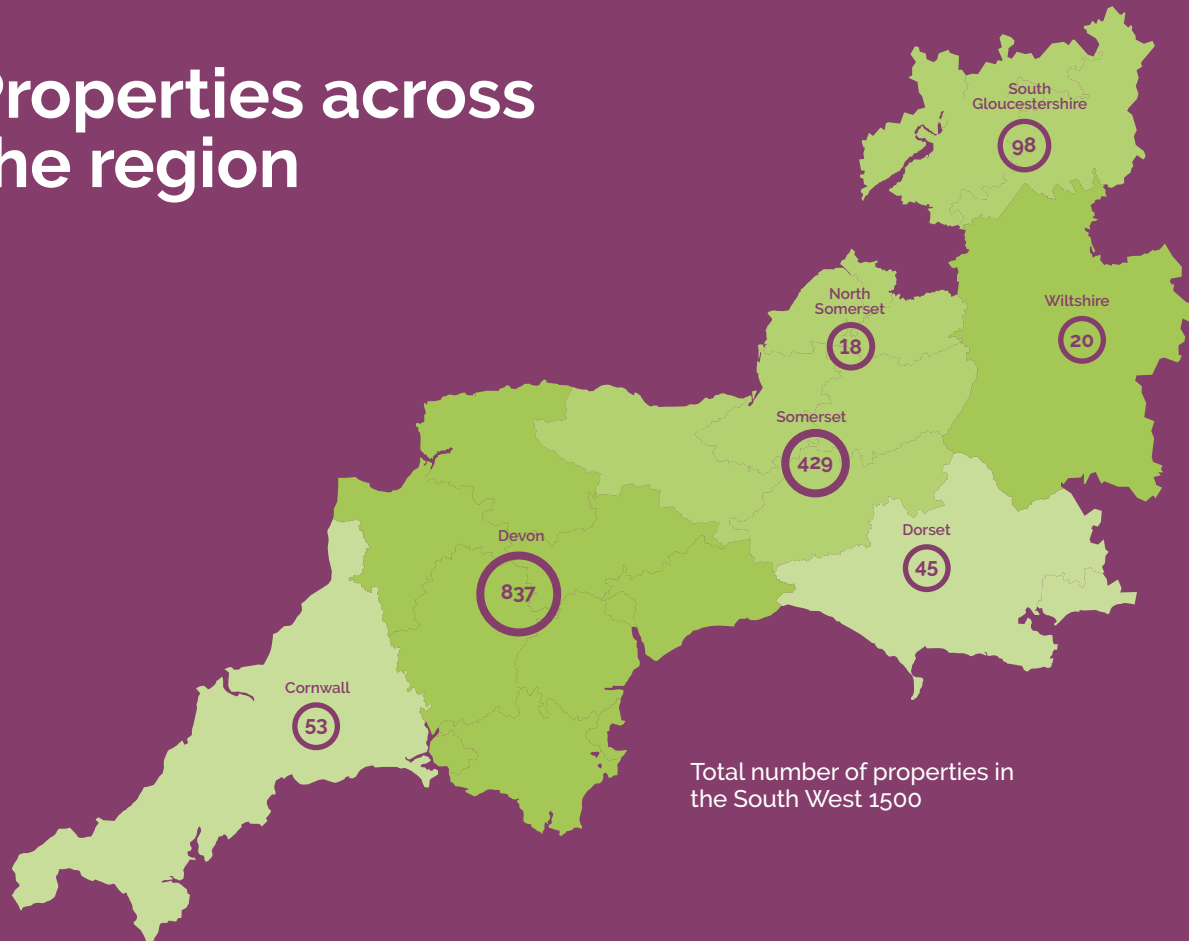
Triodos Bank UK
Deanery Road, Bristol BS1 5AS

The Housing Finance Corporation Limited
3rd Floor, 17 St. Swithin's Lane
London EC4N 8AL

Lloyds TSB Bank plc
3rd Floor, 25 Gresham Street
London EC2V 7HN

Orchardbrook, BCM Global
Crown House, Crown Street
Ipswich IP1 3HS

Properties across the region



Total number of properties in the South West 1500



Willow Tree Housing Partnership Limited is registered with the Financial Conduct Authority in England and Wales under the Co-operative and Community Benefits Societies Act 2014 and is registered with The Regulator of Social Housing as a social housing provider (Willow Tree Housing Partnership Limited's registration numbers are: Co-operative and Community Benefit Society No: 12664R; Registered by the Regulator of Social Housing No: L2424). Willow Tree Housing Partnership Limited is a public benefit entity.

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