WILLOW TREE
HOUSING PARTNERSHIP

Corporate Strategy

A PLAN FOR CHANGING TIMES



2026 | 2030

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Our Organisation

Willow Tree Housing Partnership Limited (WTHP) is a community focused housing association operating across the southwest of England that owns and manages just under 1500 homes.



WTHP provide 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.

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 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 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 Board regularly reviews the skills needed to achieve good governance and ensures that these skills are covered on the Board.

The tenants, partners and stakeholders are supported by a staff team of c.35, comprising the executive, functional managers and frontline service providers 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.

WTHP is considered a large provider by its regulator. This means that WTHP is subject to a high degree of scrutiny and its most recent judgement, published in February 2026 has evaluated WTHP as compliant in all areas, with some points of continuous improvement identified. Both the board and the staff team feel confident in their ability to be held to public account and take seriously their role in supporting the provision of safe, comfortable and desirable places that people can call home.

This strategy is written at a time of significant societal and geopolitical change. The legacy effect of Covid is only just beginning to be felt. The dynamic political and demographic changes around the globe has garnered a rising nationalistic sentiment in many countries, which has led to a rise in aggression both in communities and internationally, the consequence of which has been a marked increase in feelings of worry among many, and an economic backdrop that has squeezed the cost of living, especially for less well-off people to the breaking point. 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.

Our Purpose

WTHP is a brave and curious 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. It is committed to actively listening when people have problems and supporting them to find solutions. And it is committed to ensuring the information it holds is used wisely to inform good decisions and provide value for money.



Its leadership is clear and built upon a sound vision and mission, and in depth understanding of both the current risks we face, 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.

Recognising the changing times that we live in, the Board has refreshed the Vision and Strategic Priorities of the organisation for 2026 -30, to reflect the world our tenants are living in. We will deliver our corporate objectives because we know why we do what we do.

OUR PURPOSE

OUR VISION	OUR MISSION
Listen and Deliver - To be a trusted, compassionate, and forward thinking housing provider — one that delivers safe homes, empowers residents, and invests sustainably in communities and people.	To build and manage safe and comfortable homes that are truly affordable for people who cannot access the general housing market.

STRIVE

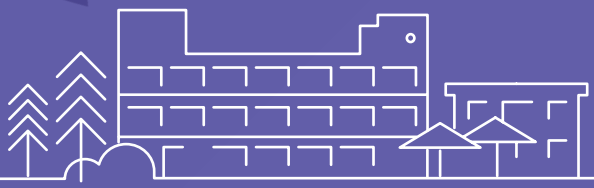
Building Success Together

Everybody involved in WTHP without exception upholds the 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 shown below:

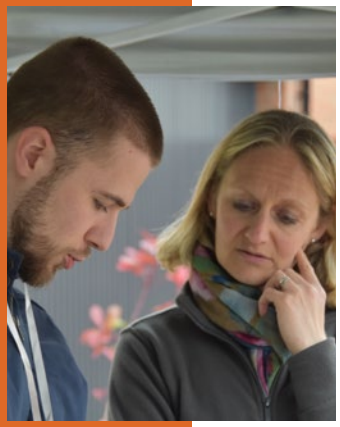


Anybody who works with us, pays rent to us, seeks services from us or collaborates in achieving shared goals with us can expect these values to be at the core of all our business practices.

OUR VALUES	WHAT DOES IT MEAN?
Supporting collaboration	Enabling staff and tenants to work together to achieve shared goals.
Trust and honesty	Being willing to listen and learn, to communicate in a way that suits people best, and to be open when we need to improve, always trying to achieve the best outcomes.
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 that 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 operate in a way that does not exclude anyone.









Our colleagues

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 can 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.



A Steady Plan for Changing Times

2026-30 STRATEGIC OBJECTIVES

The new organisational objectives have been set by the Board following wide discussion and debate to determine what WTHP can offer to the people identified by its charitable rules, and 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 manage its risks, seek to fund its 30 year business plan and measure its success over the next four years.



COMPASSIONATE SERVICE

We will put people at the heart of everything we do



SAFE HOME

We will deliver, maintain and future-proof good quality homes



RESILIENCE WITH SOCIAL PURPOSE

We will build financial strength, operational efficiency and sustainable growth



PEOPLE & CULTURE

We will be an organisation where people thrive, feel valued and deliver excellence



DATA, DIGITAL & INTELLIGENCE

We will use information to improve decisions, services and outcomes

COMPASSIONATE SERVICE OFFERING

WTHP has recognised that inconsistent information about our tenants needs and vulnerabilities has meant people do not always feel listened to.

We want everyone we deliver services to, to feel connected and fully informed. Dissatisfaction with the key repairs service has been high. WTHP will seek to deliver consistently high-quality, fair and compassionate services, supported by better tenant insight, more responsive and effective communication, and a culture of listening.

> **We will introduce tenant panels, co-design groups, and local estate forums.**

We Will Know Every Tenant Well

- We will build full tenant profiles including needs, communication preferences, and vulnerabilities.
- We will hold an annual "Tenant Conversation" to capture priorities.

We Will Offer Modern, Accessible Tenant Engagement

- We will expand digital self service, while retaining robust non-digital options.
- We will introduce tenant panels, co-design groups, and local estate forums.

Our Service Model Will Be Built on Compassionate Approaches

- We will train all frontline staff in trauma-informed, empathetic communication.
- We will assess the benefit of introducing an internal rent support advisor role to support arrears prevention and tenancy sustainability.
- We will learn from complaints and publish this learning to improve outcomes for people.

We Will Improve the Repairs Experience

- We will enable real-time updates, appointment confirmations, and clear escalation routes.
- We will introduce a tenant effort score as a core KPI.

SAFE HOMES

WTHP like all other landlord in the sector, has worked to improve the management of our homes.

We have been addressing repair backlogs and recognise the importance of being able to access every home once a year to offer support where needed and intervention if necessary to keep a safe home. We will continue to ensure every home is safe, energy-efficient, well-maintained, compliant, and proactively managed.







We Will Carry out an Annual Home Health Check

- We will make sure we access every home every year for safety, damp/mould, and wellbeing assessments.
- We will introduce the use of smart home technology for early detection.

We Will Deliver a Well Managed Repairs Service

- We will ensure minimum effort is required by tenants to achieve a completed repair.
- We will monitor satisfaction monthly and give feedback on our website.
- We will monitor contractors and ensure they act as ambassadors for Willow Tree.

Zero Tolerance on Damp & Mould

- We will robustly follow Awaabs Law and provide rapid-response between inspections.
- We will ensure root-cause investigation and planned works to prevent recurrence.

We Will Be Proactive with Asset Management & Cyclical Programmes

- We will establish a planned programmes for kitchens, bathrooms, electrics, and roofing based on proven stock condition data.
- We will publish annual asset improvement plans.

We Will Work to Defects-Free New Homes

- By introducing a first 100-day quality assurance programme.
- By introducing strengthened contractor accountabilities and KPIs.

We Will Aim to Offer Modern, Sustainable Homes

- All new homes will be built to as a minimum EPC B and low-carbon standards.
- All older stock will be brought to EPC C or better.

RESILIENCE WITH SOCIAL PURPOSE

WTHP operates with a small workforce that requires clarity of purpose to operate effectively for all.

The volatile economic environment and need to plan for the changing climate has led to the crystallisation of this key objective. WTHP will operate as a financially robust, strategically disciplined and growth-ready organisation.









We Will Deliver Financial Resilience & Value for Money (VfM)

- By embedding VfM culture across all departments.
- By introducing annual efficiency targets reinvested into homes and services.

We Will Review the Stock Strategy & Geographic Focus

- We will work to a "Right Homes in the Right Places" approach, ensuring we can deliver effectively for all tenants.
- We will consider rationalising outlying stock and reinvest in priority communities.

Growth With Purpose

- Develop and acquire new affordable homes where aligned to sustainability and community need.
- WTHP will maintain a position on merger/ acquisition: we will not actively seek a merger but remain open if approached and if cultural synergy allows.

Shared Service Models

- We will establish a project group to explore shared service opportunities with small providers (e.g. repairs triage, compliance, asset data).

Sustainability

- We will publish a sustainability roadmap and achieve a relevant sustainable housing provider certification.

PEOPLE AND CULTURE

WTHP will seek to become an employer of choice in the southwest housing sector.

Our organisation is ambitious and this requires us to manage capacity and invest in training and encourage innovation in the evolving space of data intelligence tools. We will therefore:

Invest in Skills and Career Pathways

- Introduce accredited training for housing, repairs, and sustainability.
- Offer apprenticeships and graduate/trainee roles.

We Will Promote Wellbeing as a Priority

- We will seek to ensure all staff feel "free from worry" about workload, tools they use and systems provided.
- By reducing caseloads through automation and improved processes.

We Will Make Modern Workforce Tools Available to All

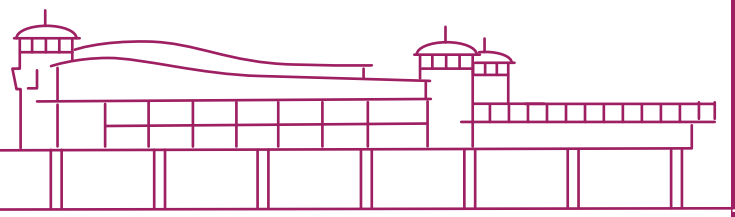
- Enable access to full Microsoft 365 integration with AI-enabled wofkflows.

Culture of Collaboration & Pride

- Celebrate success through newsletters, social media, and recognition awards.



> We will seek to ensure all staff feel "free from worry"



DATA, DIGITAL & INTELLIGENCE

WTHP will implement a full data governance framework and strategy to create an organisation where decisions are data driven, intelligence-led, and transparent.

> **We will enable access to full Microsoft 365 integration with AI-enabled wofkflows.**



Data Strategy Framework

- Governance, systems, skills, resourcing, data quality and insight generation.

- **Systems Modernisation**
  - Fully integrated housing system linked to Microsoft tools and AI capabilities.

Power BI Across All Departments

- Real-time dashboards for repairs, complaints, safety, development, finance.

Automation & AI Adoption

- Pilot business automation to streamline workflows.
- Deploy predictive analytics for repairs and arrears.

Transparency for Tenants and Regulators

- Quarterly public Repairs Dashboard and Improvement Tracker.

WTHP Delivery

2026-30 ROADMAP

YEAR	TASKS
2026-27: C2 to C1, G2 to G1	• Annual home access programme launched • Repairs excellence programme implemented • Full data strategy completed • New customer engagement model launched • Microsoft/AI-enabled systems upgrades begin
2027-28: Building strength	• First retrofit programme completed (20–50 homes) • New build programme achieves low carbon compliance • Tenant profile data embedded • Procurement frameworks updated to include ESG and KPIs
2028-29: Growth and impact	• Stock rationalisation programme underway • Demonstrable reduction in complaints • Tenant voice integrated at board or committee level • Expanded shared service partnerships • Able to measure carbon reduction annually
2029-30: Leadership and future proofing	• Sustainable housing provider certification achieved • All homes meet the required standards for climate mitigation measures as outlined by regulation • Fully data-enabled organisation with predictive insights • New housing management system in place • Strong financial resilience enabling growth into 2030s



06





Measuring Success

BY 2030

DRIVER	SUCCESS MEASURE
Compassionate Service	✓ Tenant satisfaction ≥ 85% ✓ Complaints reduced by 30% (from 25/26) ✓ MyTenancy digital engagement ≥ 60% ✓ First-contact resolution for service enquiries ≥ 75%
Safe Home	✓ 100% of homes inspected annually ✓ 95% damp/mould cases resolved within 14 days ✓ 100% compliance with building safety standards ✓ EPC C for all homes by 2030, with a pathway to B ✓ First time repairs fix > 85%
Resilience through social purpose	✓ Operating margin sustained or improved ✓ ≥ 60 new homes delivered ✓ Successful stock rationalisation plan implemented ✓ Sector-recognised sustainability certification achieved
People & Culture	✓ Employee satisfaction ≥ 85% ✓ Annual staff turnover < 10% ✓ All staff receive ≥ 20 hours of CPD per year ✓ Proven reduction in manual processes and workloads
Data, digital & intelligence	✓ Data quality score ≥ 90% ✓ All key processes supported by digital workflows ✓ At least 30% reduction in manual administrative effort (from 25/26 outputs) ✓ Predictive modelling informing asset investment decisions

07 Governance & Oversight

To reach the desired goals, accountability will be defined and responsibilities will be as follows:

Clearly Defined Responsibilities

BOARD RESPONSIBILITIES	EXECUTIVE TEAM RESPONSIBILITIES
Strategic direction	Delivery of strategic objectives
Regulatory compliance	Embedding organisational culture
Risk management and assurance	Monitoring KPIs and reporting to board
Performance monitoring via dashboards	Ensuring tenant voice is central to decision-making

08 Conclusion

By 2030, Willow Tree Housing Partnership will be:

- A **compassionate**, resident-centred provider.
- A **safe and proactive landlord**, with high-quality homes.
- A **resilient, growth-ready organisation**, using data and sustainability to drive decisions.
- A **great employer**, offering learning, wellbeing, and modern tools.
- A **transparent and trusted partner** across Somerset and Devon.



> **By 2030 we will be a safe and proactive landlord, with high-quality homes.**

Supporting Strategies

This corporate strategy forms the basis of Willow Tree's aspirations and key goals for the next four 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.

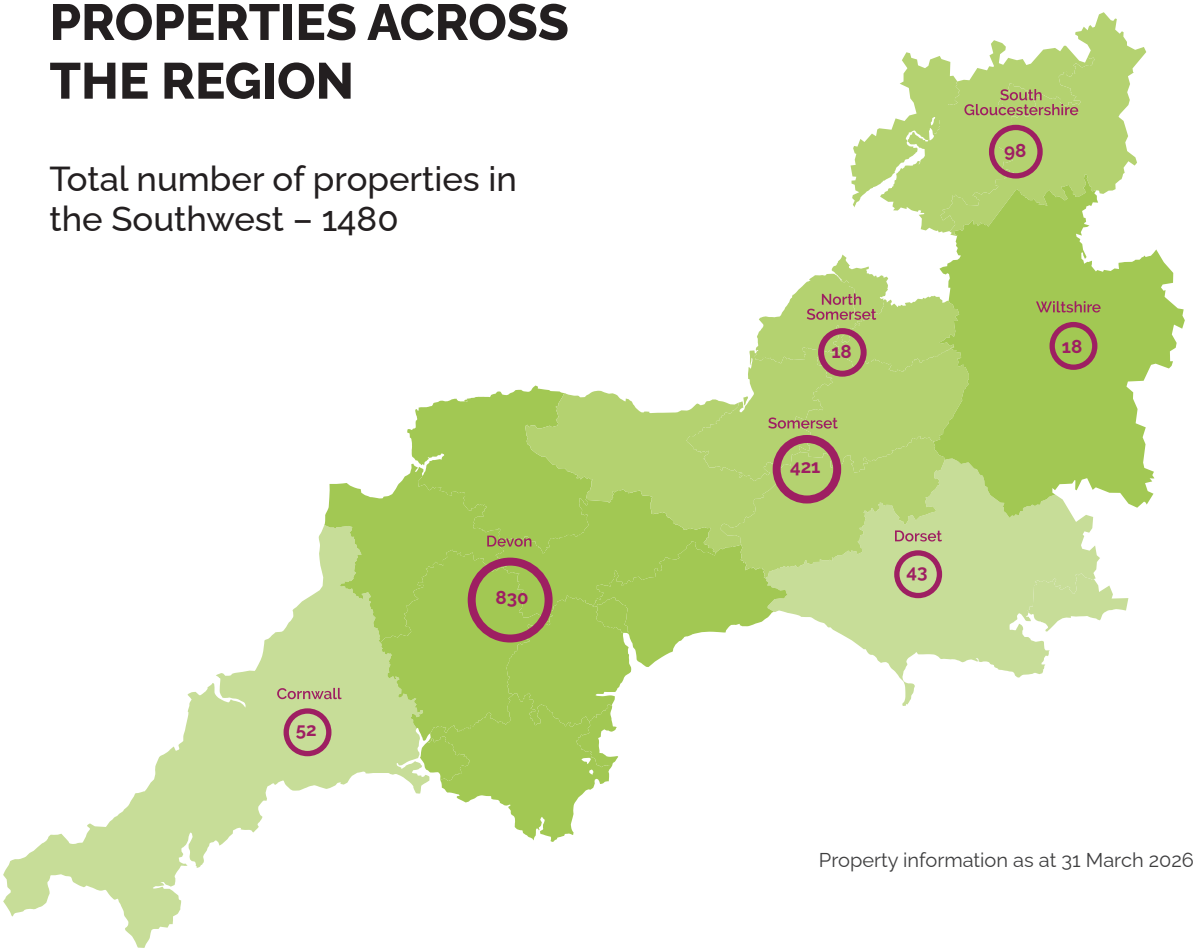


THESE ARE:

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. Strengthen neighbourhood resilience and local partnerships through place based planning.
SUSTAINABILITY	Ensuring that we are focused on mitigating our climate change impact, building climate ready homes and maintaining biodiversity.
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	Embed EDI across customer services, governance, recruitment, and community engagement.
DATA STRATEGY	Making knowledge and information management a cornerstone of how we ensure our systems are equipped to be efficient, effective and add value.
VALUE FOR MONEY	Demonstrating efficient use of resources to tenants, regulators and partners.
COMMUNICATION	Ensuring we tell our story and keep people informed appropriately.

PROPERTIES ACROSS THE REGION

Total number of properties in the Southwest – 1480



Property information as at 31 March 2026

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

WILLOW TREE
HOUSING PARTNERSHIP

Office addresses and registered address

SOMERSET OFFICE
Registered Office

Eastbridge House
Pill Road, Rooksbridge
Somerset BS26 2TN

DEVON OFFICE

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

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.



Cover image:
Burnham-On-Sea,
Somerset