



**CORPORATE
PLAN**
2016-2019

Leading
change and
doing things
differently

oaklee.ie

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VISION & VALUES

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OUR VISION

Our vision and mission:

“To build a strong business with a social purpose and be a leading provider of quality customer focused housing and support services”.

We will do this by:

- Meeting housing need
- Ensuring that our customers receive high quality responsive services that meet their needs and expectations
- Collaborating with our statutory and voluntary partners to grow our business.

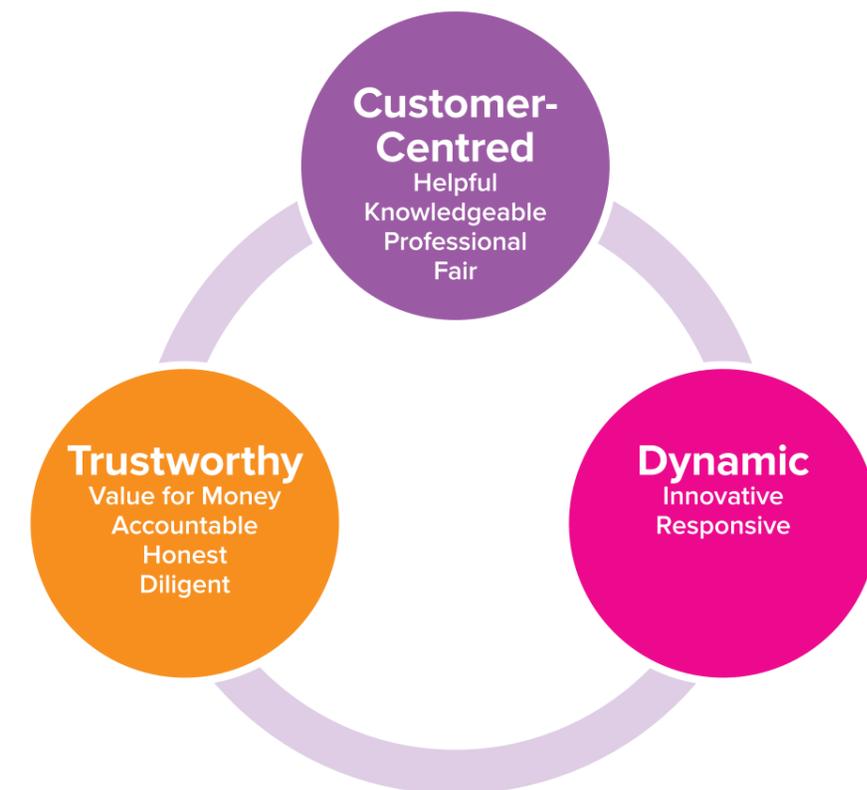
OUR VALUES

Our core values are the building blocks of our culture, providing common language and acceptable standards of behaviour.

Our values are to be:

- Customer centred,
- Trustworthy, and
- Dynamic

We will embed these values in all our work.



Our Values

FOREWORD

This strategy outlines Oaklee Housing's response to an unprecedented housing need in Ireland that has resulted in almost 140,000 people joining housing waiting lists and over 6,000 people experiencing homelessness. We are committed to playing a lead role in the delivery of quality social and affordable housing.

The Government's Rebuilding Ireland Action Plan for Housing and Homelessness sets ambitious targets nationally under five specific pillars. We recognise the opportunity for Oaklee Housing to make a significant impact on the targets by accelerating housing supply through an ambitious development programme; partnering with specialist providers to help address homelessness; and maximising opportunities to utilise land banks and acquire unused housing.

During the period of this Corporate Plan, we will capitalise on bold partnerships with local authorities, government agencies, our funders and the private sector with the aim of doubling our housing stock through acquisition, development, leasing and management.

We have a proven record of working with partners across the country to provide special needs housing to a range of people with support and care needs. We will continue to build on our experience to date, to expand existing partnerships and develop new ones so that we can help more people live independently, with person-centred care in their own local communities.

High quality customer services remain the focus of much of our work and we will keep tenants at the centre of everything we do. We will not lose sight of the importance of having excellent housing and estate management services, as well as responsive maintenance services and continued investment in our housing stock.

Oaklee Housing is a sister organisation and a member of the Choice Housing Ireland Group which has a stock of over 10,000 homes. Our strong relationship with Choice and, ability to draw on its valuable experience, has enabled Oaklee Housing to respond quickly to the changing funding environment, to access expertise and maximise opportunities.

We have stepped up to the mark, embraced regulation and are now one of the fastest growing Approved Housing Bodies (AHBs) having expanded our stock by 40% in 2015-16, mainly through private finance. We hope to continue to build on our partnership with Choice and others to achieve the ambitious goals and targets set out in this Corporate Plan 2016-2019.



John Cullen, Chairman



Sharon Cosgrove, Chief Executive



JOHN
CULLEN
Chairman



SHARON
COSGROVE
Chief Executive

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THE CONTEXT

The social housing waiting list in Ireland is at unprecedented levels and homelessness has increased to record levels fuelled by the increase in individuals and families who have unintentionally been made homeless due to economic circumstances.

It is understood that more than 90,000 households are on the social housing waiting list. Of those in need the largest group are those who live in single person households (44%) and single parent families who make up 30% of the waiting list.

In July 2016, Simon Coveney T.D., Minister for Housing, Planning, Community and Local Government, published "Rebuilding Ireland – an Action Plan for Housing and Homelessness. This Plan provides a multi-stranded, action-oriented approach to achieving many of the Government's key housing objectives, as set down in the Programme for a Partnership Government, to significantly increase the

supply of social housing, to double the output of overall housing from the current levels to at least 25,000 per annum by 2020, to service all tenure types, and to tackle homelessness in a comprehensive manner.

The Plan addresses all aspects of the housing system under five Pillars:

- Address Homelessness,
- Accelerate Social Housing,
- Build More Homes,
- Improve the Rental sector, and
- Utilise Existing Housing.

Oaklee Housing recognises the potential for the plan to significantly alleviate housing stress and homelessness. We have developed our Corporate Plan to proactively support the delivery of the five pillars.



47,000
additional social houses by 2020



140,000
on housing waiting lists



25,000
new homes needed each year to 2020



6,000
people experiencing homelessness



€5.35b
budget to deliver Rebuilding Ireland

HIGH LEVEL RESPONSE



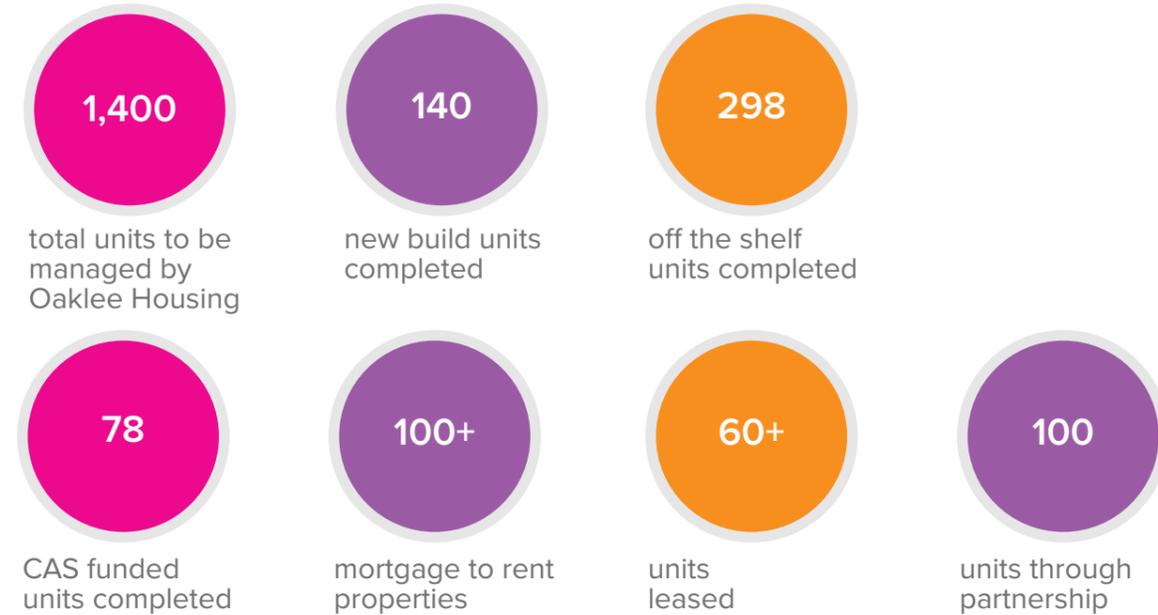
Oaklee Housing's High Level Response	
Pillar 1: Address Homelessness	<ol style="list-style-type: none"> 1. Keep people in their homes through Mortgage to Rent 2. Partner with homeless providers to supply housing for specialist homeless services
Pillar 2: Accelerate Social Housing	<ol style="list-style-type: none"> 1. Increase our total number of units in management by 760+ units 2. Work with local authorities, agencies and private sector to maximise opportunities for accessing land banks and use for social housing
Pillar 3: Build More Homes	<ol style="list-style-type: none"> 1. Work with local authorities and private sector to participate in the Local Infrastructure Fund 2. Partner to build (and manage) large scale mixed tenure developments
Pillar 4: Improve the Rental Sector	<ol style="list-style-type: none"> 1. Register all Oaklee Housing tenancies with the Residential Tenancies Board (RTB) and use the RTB to effectively manage tenancy disputes 2. Diversify our housing provision, explore new models and progress strategic partnerships.
Pillar 5: Utilise Existing Housing	<ol style="list-style-type: none"> 1. Work with local authorities, other AHBs and the private sector to ensure that vacant housing is brought back into use 2. Work with the Housing Agency to acquire vacant units with private finance for social housing 3. Seek opportunities to avail of the Buy and Renew Initiative to target empty properties for social housing



SUMMARY OF OUTCOMES

By the end of 2019, we aim to have achieved the following:

HOUSING STOCK



FUNDING THE PLAN



INVESTMENT IN OUR STOCK



ABOUT OAKLEE HOUSING

Oaklee Housing is a not-for-profit company, with charitable status and an approved housing body registered with the Department of Housing, Planning and Local Government. Oaklee Housing is governed by a Board of Management made up of voluntary Board members who are committed to social housing and who donate their time and expertise to Oaklee Housing.

Oaklee Housing was established in 2001 as Oaklee Housing Trust, originally with management services delivered from Northern

Ireland. The early Oaklee Housing schemes were in the border counties and the eastern corridor as far as Dublin. However, in recent years we have expanded to have housing now in 18 local authorities and new developments due for completion shortly in a further three local authority areas. With a team and management now based in Dublin, we have a permanent presence and our plan is to expand to have Oaklee Housing present in almost every county in Ireland by the end of this Corporate Plan.

OAKLEE HOUSING IN 2016



OAKLEE HOUSING IN 2019



OUR STRATEGIC GOALS



1 GOAL 1 BUSINESS GROWTH

We aim to increase our total number of units in management during the corporate plan period by 764 units. In addition, we see the benefits of scale and would welcome the opportunity to grow further through amalgamation /mergers with other voluntary housing association/s or stock transfer from local authorities.

We plan to:

- ▶ Double our stock through expansion of our pipeline of off-the-shelf and design & build schemes.
- ▶ Work with local authorities, the Housing Agency and developers to access development sites and maximise opportunities for acquisitions
- ▶ Play a leading role in the Mortgage To Rent Programme (MTR) so that families at risk of homelessness have a more secure future.
- ▶ Diversify our housing provision, explore new models and progress strategic partnerships.

OUR DIVERSE DEVELOPMENT PROGRAMME WILL BE MADE UP OF:

Developer Led Partnerships	Off-the-Shelf/Turnkey/Design and Build schemes
New Build	Site acquisition and construction of social housing dwellings
CAS Funded Schemes	New build construction of CAS funded supported housing/special needs schemes
Long Term Leasing	Managing social housing stock on behalf of other landlords
Mortgage to Rent	Assisting home owners who are at risk of losing their homes
Affordable for Sale/Private Rental	Acquisition and new build construction of affordable/private rental dwellings
Stock Transfer	Contribute to meaningful sector consolidation through merger/amalgamation activity



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GOAL 2 LONG TERM VIABILITY

Our goal is to achieve long term viability through maximising government and private borrowing, to generate surpluses and deliver value for money. We will ensure that we meet our business financial and business growth targets to maintain our financial viability.

Our plan assumes that the capital expenditure required to deliver our development programme will come from a cocktail of funding including:

Private Finance	Loans from the Housing Finance Agency (HFA) and commercial lenders
CALF (Capital Advance Leasing Facility)	Capital advance from DECLG of up to 30% of scheme costs
Payment & Availability Agreement (P&A)	Underpinning the debt finance provided by HFA and commercial lenders
CAS (Capital Assistance Scheme)	Grant funding for special needs schemes

- ▶ We will also seek to secure commercial borrowing to fund our development programme and our mixed tenure developments.
- ▶ We will assess the potential for setting aside a land banking fund to acquire sites for new build schemes.
- ▶ The Board and Committees will, in light of our diverse funding sources and increasing level of borrowing of private finance, carefully oversee our treasury management policy.
- ▶ Continuously monitor our interest rates on borrowings and market exposure.
- ▶ Ensure that risks are appropriately mitigated and managed through consistent use of a comprehensive scheme sensitivity analysis prior to approval.

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GOAL 3 SERVICE EXCELLENCE

Our goal is to deliver our ambitious growth plans and provide a quality service to our customers we acknowledge the need to have professional, highly motivated and properly resourced staff teams.

- ▶ Create a high performance culture, recruiting and retaining high calibre people, as well as on-going investment in their training and development.
- ▶ Invest in enhanced mobile working solutions which will maximise the potential for tenant engagement.
- ▶ Seek feedback from our customers annually and continue to involve our tenants, ensuring input into the design and development of our services.
- ▶ We will continue to involve our tenants through our Tenants' Forum and Menu of Involvement in the design and delivery of our services. We will ensure that communication with our tenants is effective and inclusive.
- ▶ On an on-going basis we will review and update all our policies and procedures to ensure that they comply with current statutory requirements and good practice.

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GOAL 4 MANAGING OUR ASSETS

Our asset management plan aims to ensure that we have a strong asset base of well-maintained properties that provide our customers with good quality homes. During the corporate plan period:

- ▶ We will invest €1,167k in the long term maintenance of our housing stock.
- ▶ We will complete a stock condition survey to inform our appropriately resourced annual planned and cyclical maintenance programmes.
- ▶ We will continue to provide a cost-effective day-to-day response maintenance service and set challenging performance standards for completion of repairs.
- ▶ We will explore the potential for establishing regional response maintenance contractor panels and explore the potential for partnership working with other housing providers to achieve economies of scale in the delivery of a value for money response repair services.





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GOAL 5 RAISING OUR PROFILE

Our aim is to develop a comprehensive communications plan for Oaklee Housing which will achieve the following:

- ▶ Raise the profile and brand awareness of Oaklee Housing
- ▶ Effectively communicate with our customers and external stakeholders
- ▶ Maximise the use of communication channels including web, social media, on-line platforms, digital marketing channels and PR
- ▶ Engage with and influence policy makers and Oireachtas structures
- ▶ Position Oaklee Housing as a leading player in the delivery of social housing and as a key opinion leader in social housing policy in Ireland

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GOAL 6 GOOD GOVERNANCE

We acknowledge that better regulation is important for protecting the interests of our tenants and enhancing the reputation of our sector. Open, accountable and effective governance is at the heart of all our actions. Through our action plan we will ensure that we have a governance structure which meets the highest governance standards.

- ▶ Ensure a robust governance framework is in place in Oaklee Housing
- ▶ Review policies and procedures across organisation to ensure that they are fit for purpose, comprehensive and consistently applied
- ▶ Ensure full compliance with Voluntary Regulation Code and statutory protocols

ANNUAL BUSINESS PLANNING AND PERFORMANCE MANAGEMENT FRAMEWORK

In order to implement our six strategic goals and ensure that we have a robust performance management framework, we have set three-year corporate plan key performance indicators (KPIs), and annual business plan objectives and KPIs.

Annual business plans will be structured around the 'balanced scorecard' based on four key business areas (see below).

Financial and Business Growth

A

Meeting financial targets, maintaining financial viability, provide more homes and invest in our stock.

Internal Business Processes

B

Continually improve our performance and business processes demonstrating we meet our statutory obligation and provide value for money.

Innovation and Learning

C

Fostering a culture of learning and development.

Customer Excellence

D

Provide our tenants and stakeholders with excellent services that meet needs and expectations.

To monitor performance, a high level KPI report is presented monthly to Management Team and quarterly to the Board, together with a Balanced Scorecard. During the course of the Corporate Plan an annual business plan will be developed with annual targets.



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