

Corporate Strategy 2026–2029

Purpose

Providing safe, warm, affordable homes to support our communities

Strategic Objectives

S = **Service Excellence** that puts customers first

H = **High-quality Homes** that people are proud to live in

A = **A great place to work**, where our team can thrive

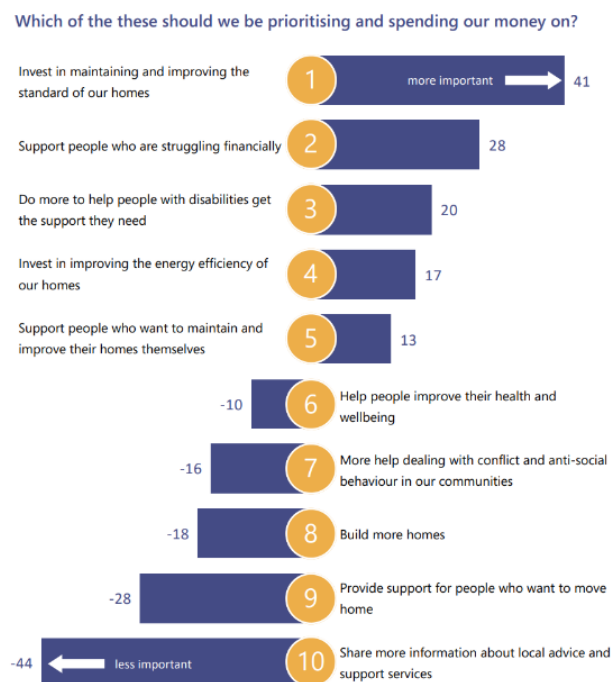
L = **Long-term sustainability**, an organisation fit for the future

1. Service Excellence

SHAL prides itself on giving its customers excellent service. It's at the heart of what we do and our tenants agree- 83% say we are a good landlord, 86% say we provide a good repairs service and 89% say they are treated fairly and with respect.

This strategy's core focus is to continue delivering our great service, while making changes that will further enhance our customers' experience and their influence in how we work.

Our tenants have directly influenced the development of this strategy by telling us what matters most to them:



Life is not always easy, and it is clear our customers would like **help and support** across several areas. Our teams are trained in specialisms such as financial inclusion that enable us to help our customers sustain their tenancies, however SHAL is not a provider of supported housing and often is not best placed to deliver the support our customers need.

We will therefore **work in partnership** with local and national organisations that can support our customers. Building this network and signposting effectively will help our customers get the right support that is appropriate to their situation.

Over the course of this strategy, we will offer more ways for our customers to influence what we do, **creating focus groups** on specific topics and **opportunities to influence and scrutinise** our services and performance.

We will also **work in the community**, bringing people together to tackle local issues, and accessing funding where it may benefit the areas we work in.

We pride ourselves on **knowing our customers** and will ensure we hold **accurate and up to date data**. Knowing who lives in our properties, their needs, and adapting our services to them is more important than ever to delivering service excellence.

We will open **new channels of communication** for our customers to interact with us. Our new website will develop into a place our customers can find out what they need, when they need it.

We will also create **options for customers to self-serve**, by reporting repairs and other issue online at the time, place, and on the device of their choice. These changes will enhance SHAL's friendly, responsive, person-centred service by creating choice and increasing accessibility for our customers.

2. High-quality Homes

'Invest in maintaining and improving the standard of our homes' is **our tenant's number 1 priority** for where we should spend our money. The government is also committed to driving improvements to the condition of social housing – further iterations of **Awaab's Law** will go live later this year, and will introduce a revised version of the **Decent Homes Standard** in 2035.

SHAL will ensure we meet any changes in legislation while also improving the energy performance of our homes as we work towards the goal of net zero carbon emissions.

In year 1 of this strategy we will engage with our tenants to help us define a **'SHAL standard'** for our homes, ensuring they are fit for the present day and the future.

It will outline what **'high-quality'** means for SHAL and embed this in all property maintenance and development activities.

It will also help shape our investment plans and priorities and make the best long-term decisions for our stock, while achieving value for money.

We will ensure that we have validated, accurate data on the compliance and safety of our homes and will invest in digital solutions that **improve the quality and efficiency** of our data. Reduced manual data entry will not only reduce risk but enable colleagues to spend more of their time on activities that add value to our tenants.

SHAL has a **clear plan for ensuring all its properties meet EPC C** (or above by 2030). We will explore all opportunities to apply for any new funding streams to assist with improving the carbon performance of our homes. We will support our customers to access any assistance they can with utility costs.

We will model the relative and absolute performance of our homes on multiple levels – looking at the portfolio as a whole.

When homes are found to be performing poorly, we will use our disposals framework to carry out options appraisals to get the best outcome for our tenants and SHAL. We will develop bespoke interventions for homes or areas that are identified as failing, or at risk of failing. These could include **redevelopment or disposal** where further investment does not offer good value.

3. A great place to work

SHAL is a great place to work, but in recent years, staff turnover has been high (48% in 2024/25). Over the course of this strategy we will ensure colleagues can develop, thrive and will want to stay at SHAL.

We have begun this process by consulting with colleagues on the benefits they would like to see, and will be offering a revised and enhanced offer from April 2026. Offering fair pay and benefits will **improve satisfaction, well-being and retention**.

All colleagues have been involved in the creation of this strategy, ensuring they have a voice in the future of the organisation. We will continue to treat colleagues with respect and involve them in our decision making through a variety of means, including team away days and colleague surveys.

While SHAL has a purpose and defined objectives, it does not currently have a defined set of values. In year 1 of this strategy, we will work with colleagues **to agree and embed a set of values**, outlining what it means to work at SHAL and what is expected of everyone that works here.

We will ensure these are role modelled by the leaders in organisation- our Board and Management Team, who will lead by examples as ambassadors for the organisation.

We will also take steps to break down any silos, ensuring that data is readily available, shared appropriately and that SHAL truly acts as one team, ensuring customers get the same consistent service from whoever they engage with.

4. Long-term sustainability

SHAL is great at what it does - providing safe, warm, affordable homes to support our communities, coupled with excellent customer service. But in an ever-changing world, all organisations must modernise and grow.

Year 1 of this strategy will see SHAL exploring opportunities to **increase its housing stock** including new developments, working with new developers and stock acquisitions and mergers. This will help formulate a plan for sustainable growth in future years, that is not bound by any limit of remaining under 1,000 units.

SHAL achieves what it does with the help of others. In a housing environment of rising regulation and financial pressures, collaborating closely with our tenants and partner organisations is more important than ever. We have already started forming these links through our memberships of the **Somerset Chamber of Commerce** and **South-West Business Council** and will continue to raise SHAL's profile to form new partnerships, access funding and innovate in how we work.

We will implement a comprehensive communication strategy to enhance our visibility and strengthen our brand, positioning SHAL as a trusted provider in the sector. Our **new website** will serve as a central platform, showcasing our achievements, sharing insights

Our financial strength forms the bedrock for our work now, and investment in the future. We will **secure new borrowing** to ensure we can invest in our properties, people and services, while delivering growth. We are embedding a renewed focus on **value for money**, ensuring this is at the forefront of prudent financial management. Our approach to value for money will not focus solely on cost reduction but will focus on becoming more efficient in how we operate, while improving service delivery.

While not currently subject to inspection by the Regulator of Social Housing, we will regularly **self-assess compliance** against our regulatory standards, accompanied by deep dives and internal audits of specific areas, reporting findings annually to the Board, ensuring transparency and continuous improvement.

The review we are currently undertaking of the software our teams use will help us form a plan to **modernise and streamline** how we work. Through this, we will provide colleagues with tools that aid, rather than hamper, their work and options for **customers to self-serve**, reducing manual data entry and freeing up colleagues' time to deliver greater outcome for customers.

We will provide a **single version of the truth** of our property and customer data, **automating processes** where possible and identifying where services and decision making could be enhanced through the **use of smart technology or artificial intelligence**.

Action plan-

Year 1-

Service Excellence – Increase options for resident engagement

High-quality Homes - Define a 'SHAL standard' for our homes

A great place to work- Create and embed company values

Long-term sustainability- Secure new funding

Year 2-

Service Excellence – Launch of customer self-service options

High-quality Homes - Develop and procure a 5-year planned investment programme

A great place to work- Create apprenticeship opportunities

Long-term sustainability- Deliver programme of stock acquisitions

Year 3-

Service Excellence- Creation of training and employment opportunities for tenants in conjunction with partner agencies

High-quality Homes - Pilot installations of smart property tech in customers' home

A great place to work- Achieve Investors in People accreditation

Long-term sustainability- Achieve full integration of housing, finance, asset and customer systems into a single platform

Measuring success – KPIs

Service excellence

KPI	Acuity benchmark	24/25 performance	25/26 target	YTD	26/27 target
Tenant Satisfaction with the Maintenance service following repair	95%	97%	95%	98.3%	98%
Tenant Satisfaction with the Maintenance service following repair - response rate	N/A	N/A	N/A	38.3%	N/A
TSM Repairs completed within target timescale (emergency 24 hours)	99.5%	90%	100%	100%	100%
TSM Repairs completed within target timescale (non-emergency 5 weeks)	93%	60.2%	95%	91.9%	95% and reduce timescale to 28 days
Stage 1 complaints per 1000 homes (Annualised)	23.5	25.7	N/A	13.6	N/A
Stage 2 complaints per 1000 homes (Annualised)	2	5.1	N/A	5.1	N/A
Complaints responded to within Complaint Handling Code timescales (Stage 1)	100%	100%	100%	100%	100%
Complaints responded to within Complaint Handling Code timescales (Stage 2)	100%	100%	100%	100%	100%
Anti-social behaviour cases per 1000 homes (Annualised)	20	32	N/A	32.3	N/A
Hate incidents per 1000 homes (Annualised)	0	Not reported	N/A	1.7	N/A
Average re-let time (days)	32	61	35	48	35
Void loss (rent lost through voids as % of total rent debit)	0.6%	0.8%	0.2%	0.5%	1.0% (in line with budget)

High quality homes

KPI	Acuity benchmark	24/25 performance	25/26 target	YTD	26/27 target
Stock conditions surveys (target for FY end)	100%	N/A	100%	72.1%	100%
% valid EPC certificate against all homes	N/A	98.8%	100%	100%	100%
Homes with EPC C or better (target for FY end)	75%	78.3%	82%	78.1%	86%
% homes that fail to meet Decent Homes Standard	0%	0%	0%	0.3%	0%
Gas safety checks	100%	100%	100%	100%	100%
Fire risk assessments (FRA)	100%	100%	100%	100%	100%
FRA remedial actions completed within target timescale (SHAL)	N/A	83.3%	100%	75%	100%
FRA remedial actions completed within target timescale (third party)	N/A	0%	100%	N/A	100%
Electrical Testing completed against homes requiring annual test in the year	N/A	99.8%	100%	99.6%	100%
Asbestos re-inspections completed against homes requiring re-inspection	100%	98.9%	100%	99.6%	100%
Lifts re-inspected	100%	76.9%	100%	100%	100%
Oil safety checks	N/A	100%	100%	100%	100%
Solid fuel safety checks	N/A	92.7%	100%	100%	100%
Smoke alarms checked	N/A	99%	100%	99.7%	100%
CO detectors checked	N/A	97.4%	100%	99.7%	100%
Asbestos-related incidents	N/A	N/A	N/A	0	N/A
Property-related incidents	N/A	N/A	N/A	1	N/A

A great place to work

KPI	Acuity benchmark	24/25 performance	25/26 target	YTD	26/27 target
Staff satisfaction	N/A	N/A	N/A	N/A	To be decided
Staff turnover	N/A	48%	15%	21%	15%
Staff sickness	N/A	N/A	N/A	175 days	N/A
Work-related incidents	N/A	N/A	N/A	2	N/A

Long-term sustainability

KPI	Acuity benchmark	24/25 performance	25/26 target	YTD	26/27 target
Gross arrears (all tenants)	2.77%	2.8%	2.5%		2.5%
Rent collected (current tenants)	99.45%	98.15%	99.8%	102.0%	99.8%
Disposals per year	N/A	0	2	0	N/A
New supply – new homes in FY	N/A	0	19	5	7
New supply as % of SHAL homes	N/A	0	2%	0.6%	2%