

IronOak



IRON OAK

STRATEGIC PLANNING POLICY

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Control Sheet

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1. Introduction

- 1.1. IronOak Homes will maintain a clear Strategic Plan that sets out the long-term direction of the organisation and defines its Key Priorities.
- 1.2. Strategic planning will be delivered using a structured and cyclical approach, informed by:
 - Evidence and business intelligence,
 - Resident feedback and engagement,
 - External horizon scanning and regulatory developments,
 - Organisational learning and performance review.
- 1.3. The Board of IronOak Homes shall be responsible for directing the organisations Strategic direction.
- 1.4. The Executive leadership Team shall be responsible for:
 - Leading the planning cycle,
 - Drafting the strategic Plan,
 - Implementing and monitoring the delivery of the plan

2. Purpose

- 2.1. The purpose of this policy is to establish a consistent, structured and evidence-based framework for strategic planning at IronOak Homes. It sets out guidance to ensure our strategic objectives are aligned with:
 - Our Social purpose
 - Our purpose, vision, mission and values.
 - Statutory and Regulatory obligations under the Regulator of Social Housing; and
 - The needs and expectations of our residents and stakeholders.
- 2.2. This Policy applies to the Board, The Executive Leadership Team, Committees, and any persons involved in the development, oversight, and delivery of the strategic Plan.

3. Strategic Planning Principles

- 3.1. In the development of the strategic Plan, ELT will ensure that the Plan:
 - Reflects and embeds our social purpose and not-for-profit status,
 - Places residents, safeguarding and outcomes at the centre of decision-making,
 - Aligns with the organisation's risk appetite and risk management framework,
 - Is grounded in evidence-based data
 - Supports long-term sustainability, financial viability and compliance

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4. The Planning Process

- 4.1. IronOak will adopt a systematic and cyclical approach to developing its corporate plan. The Plan's development shall be informed by robust evidence collected from a diverse range of sources.

4.2. Phase 1: Data Gathering

Internal Performance Review:

Evaluate the organisation current position, including, but not limited to, the following:

Review performance against the existing corporate plan

- Lessons learned from previous plans
- Review internal systems, processes and practices and outcomes of internal/ external Audits to identify areas of strategic improvement.
- Detailed insight from resident surveys, complaints, feedback and specialised engagement sessions with residents, especially vulnerable residents.
- SWOT analysis; assessing the organisation's strengths, weakness and threats
- Input from Landlords, third party support providers, Local authorities

External Intelligence

Examine Political, social, technological, Legal and environmental landscape to identify incoming trends. statutory and regulatory changes that may impact the organisation.

4.3. Phase 2: Data Analysis

The executive Leadership team is responsible for analysing data to identify areas of priority, challenges and risks.

The executive Leadership will present the findings to the board to inform and aid the Board in defining the organisations strategic objectives.

4.4. Phase 3: The Development of the Strategic Plan

The Executive Leadership Team shall lead the drafting of the strategic plan. When doing so, ELT, will commit to ensuring that the plan aligns with the organisations:

- Risk appetite; as approved by the Board
- Vision, Mission and Values.
- Clearly informed by the outcome of the evidence gathering in phase and the analysis outcome in phase 2.

Additionally, the plan must contain, clearly define the following components to enable successful monitoring and implementation:

- Achievable Actions: clearly defined actions against each key priority

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- Key performance Indicators: Metric that will be used to measure progress and successful completion of the actions.
- Delivery timescales: Clearly defined timeframes for completion of actions.

4.5. Phase 4: Finalisation, Approval, and Distribution

The formalised plan shall be presented to the Board for, review, feedback and approval.

- Formal review: The CEO shall present the finalised plan to the Board, for their review, feedback and approval.
- Distribution: The approved plan shall be communicated and distributed to all key stakeholders.
- Implementation and Embedding: ELT is responsible for implementing the plan, and ensuring its objectives are embedded into relevant departmental plans and individuals' objectives across the organisation to ensure effective deliver.

5. Roles and Responsibilities

5.1. The table below sets out the drafting of the corporate plan process, responsibility owners.

Role	Key responsibility
The Board	• Set the organisation's roles and responsibilities every 2-3 years. • Monitor Progress. • The Executive Leadership Team will translate this into a detailed Corporate Plan, setting out the overarching strategic objectives, key priorities and Key performance indicators and delivery timescales. • The Board will approve the final plan, provide strategic continuous strategic oversight.
Executive Leadership Team	• Lead the strategic planning process, draft the plan and deliver the key priorities. • Oversee the appropriate communication and distribution of the approved plan to staff and stakeholders published on the organisation's website. • Ensure the plans objectives are embedded in operational activities.

6. Monitoring Arrangements

6.1. The Board holds overall responsibility for setting the organisation strategic direction approves:

- Annual reviews, and
- Any mid-term refresh.

6.2. Committees provide ongoing assurance:

- Audit and Risk Committee: financial and risk alignment,
- Resident Committee: resident-centred outcomes and feedback,
- Governance Oversight Committee (where applicable): regulatory compliance.

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7. Implementation, Monitoring and Delivery:

7.1. Delivery of the Corporate Plan will be monitored and reported using:

- 'Key Priorities Delivery Tracker'
- Quarterly updates to Committees.
- KPIs and milestones aligned to strategic priorities.

7.2. The Corporate Plan must be embedded into departmental plans, operational delivery,

7.3. The Corporate Plan will be reviewed annually by the Board to ensure continued relevance and effectiveness.

7.4. A formal mid-term refresh of the Corporate Plan will take place during Year 2–3 or sooner if deemed necessary by the Board.

8. Related Documents

- Strategic Risk Register (SRR)
- Key Priority Delivery Tracker
- Resident Engagement Framework
- Governance & Financial Viability Standard (RSH)
- Corporate Plan