

Making homes and lives better  
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## Your Care, Your Community, Your Future



# 2021-2026



Wheatley Care part of Wheatley Group  
Our five-year strategy







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# OUR VISION FOR 2021 TO 2026

Wheatley Care, the care arm of Scotland's largest housing organisation, Wheatley Group, is committed to delivering outstanding, customer-focused services to the people we work for. As part of the Group, we are uniquely placed to influence the social care sector and address key national challenges such as homelessness, the implementation of Housing First and our wider suite of products and services.

We believe everyone is entitled to live an independent, healthy and happy life, filled with opportunity and it is our ambition to ensure the people we work for do exactly that.

We are incredibly proud of our achievements to date, some of which include:

- › We developed our innovative W.E. Care Model utilising mobile technology and establishing our Community Engagement approach.
- › We undertook a wide range of investments in our staff including the introduction of the Living Wage, W.E. Benefits and bespoke learning academies.
- › We achieved sector leading financial performance, turning deficits to surplus, introducing our Care Business Framework and raising an additional £1million grant funding.
- › We established strong links with all partners across the Group and externally to deliver a number of initiatives in collaboration, such as our Housing First partnerships, Livingwell and TSS support, and the development of Tenancy Star.
- › We demonstrated the quality of our services via the introduction of our Performance & Assurance Framework as well as our Service Improvement approach and received external validation via our Care Inspectorate performance as well as external awards and accreditations.
- › We transformed our approach to service design as evidenced by the introduction of the 415 and Cluster projects, self-directed support models and numerous research projects.
- › We brought our care services together in one effective organisation - Wheatley Care.

We also achieved excellent performance with overall customer satisfaction at 94%.

Providing excellent services and working collaboratively with the people we work for - with compassion, dignity and respect will always be central to our strategic ambitions.

**Your Care, Your Community, Your Future**, sets out how we will take our services forward on this next stage of our journey from 2021 to 2026. This is our first strategy as Wheatley Care and it is an exciting time for us as we rise to new challenges and widen our geographic footprint further by supporting the latest partnership within the Group, Dumfries and Galloway Housing Partnership (DGHP). We now operate in a diverse range of geographies across Scotland to meet the care and support needs of the people we work for.

We will build on our previous successes using our professional expertise and the latest technological solutions to construct a truly unique offering to the people we work for. Harnessing our scale and depth of knowledge, we will seek to shape and lead innovation in care both locally and nationally. This will include utilising our creative thinking and collaborating with other partners to respond to Scottish Government priorities in areas such as homelessness, rapid rehousing and older people services, supporting, for example, housing 2040 and addressing the needs of an ageing population.

Enabling the people we work for to become more resilient, is central to our identity and purpose. We remain committed to working with people to break down barriers so that they can live full, independent lives, unleashing their potential.

Providing value to the people we work for will continue to be at the heart of our decisions and we will offer people even more choice in how they engage with us.

We will deliver our vision for our communities against a backdrop of significant external challenges, not least rising levels of poverty, digital exclusion and the impact of Welfare Reform and Universal Credit. Continuing public sector spending cuts are also impacting commissioned services resulting in a fluid funding environment for some of our services, and considerable uncertainty ahead. We also recognise the challenges our customers are facing in this Covid-19 era and we believe we are ideally placed, working alongside our partners, to support them and play a strong role in a fair and socially just recovery.

Never has social care faced such significant challenges but neither has there been a greater opportunity to



recognise the contribution that the social care sector makes to the health and care needs of all of society. During the life of this strategy, we will continue to drive forward the dialogue in this arena to influence the transformation of care in a national context.

In particular, we will take into account the recommendations of the Adult Social Care Review to ensure Wheatley Care continues to set the benchmark for personalised support services, delivered in collaboration with our partners in Group and in the wider care environment. This Review has set the scene for the most radical transformation in social care for over a generation and its' key focus is on placing social care as a basic human right that is viewed as importantly as our world famous NHS. It has a sharp focus on driving up standards and improving peoples' experience through altering how social care is designed and procured. In addition, it addresses the importance of appropriate terms and conditions for those employed in the sector. Our strategy is in alignment with, and

reflects some of the ambition set out in the review.

By 2026, we know that the expectations of both the people we work for and our staff will be very different. However, we will continue to build a shared and cohesive culture focussed on delivering services that are right for the people we work for. We will be an agile organisation, always innovating to find new solutions and better outcomes for stakeholders, staff and the people we work for. We will evolve how we work, listening and responding so that we remain in the best possible shape to deliver on our ambitions.

**At the heart of our strategy for 2021 to 2026 are four strategic themes:**

- › Changing lives and communities
- › Delivering exceptional customer experience
- › Making the most of our people, our assets and our services; and
- › Enabling our ambitions.



# OUR VISION

## - WHEATLEY CARE IN 2026

Our vision is to build the capacity of individuals to enable them to live well and fulfil their potential for a better quality of life. Our personalised approach will put the people for whom we work in control of a tailored and responsive service which:

- > offers choices,
- > is flexible enough to change as they change,
- > is affordable, and
- > enables them to avoid crisis, become more resilient, and be as independent as possible.

We will continue to focus our efforts around our main activities:

- > Supporting older people to live life to the full via our Livingwell model
- > Delivering high quality personalised self-directed support services
- > Leading the way in the eradication of homelessness and engaging those who are experiencing homelessness.

As part of Wheatley Group we make a significant contribution to what the Group as a whole strives to do for its customers, communities, people and stakeholders. Our strategy is set within the context of the Group Strategy for 2021-26 and the themes, outcomes and impact it seeks to deliver, set out below.



| Strategic themes:                                  |  |   |   |   |
|--|--|---|---|---|
| Delivering Exceptional Customer Experience         | Making the Most of our Homes and Assets                                | Changing Lives and Communities                    | Developing our Shared Capability                              | Enabling our Ambitions  |
| Strategic outcomes:                                |  |   |   |   |
| Progressing from excellent to outstanding          | Increasing the supply of new homes                                     | Shaping Care services for the future              | W.E. Think - creating our "Think Yes Together" culture        | Raising the funding to support our ambitions                    |
| Enabling customers to lead                         | Investing in existing homes and environments                           | Developing peaceful and connected neighbourhoods  | W.E. Create - driving innovation                              | Maintaining a strong credit rating and managing financial risks |
| Developing a customer led repairs service          | Setting the benchmark for sustainability and reducing carbon footprint | Supporting economic resilience in our communities | W.E. Work - strengthening the skills and agility of our staff | Evolving digital platforms to support our activities            |
| Differentiating Lowther Homes from its competitors | Building community voice, engagement and resilience                    |   |   | Influencing locally and nationally to benefit our communities   |

The delivery of our outcomes will be assessed through a series of key performance indicators and impact measures. These will demonstrate our progress towards the outcomes throughout the life of the strategy.

Performance indicators will be measured and monitored on a regular basis. These are detailed below each of the relevant themes within this document.

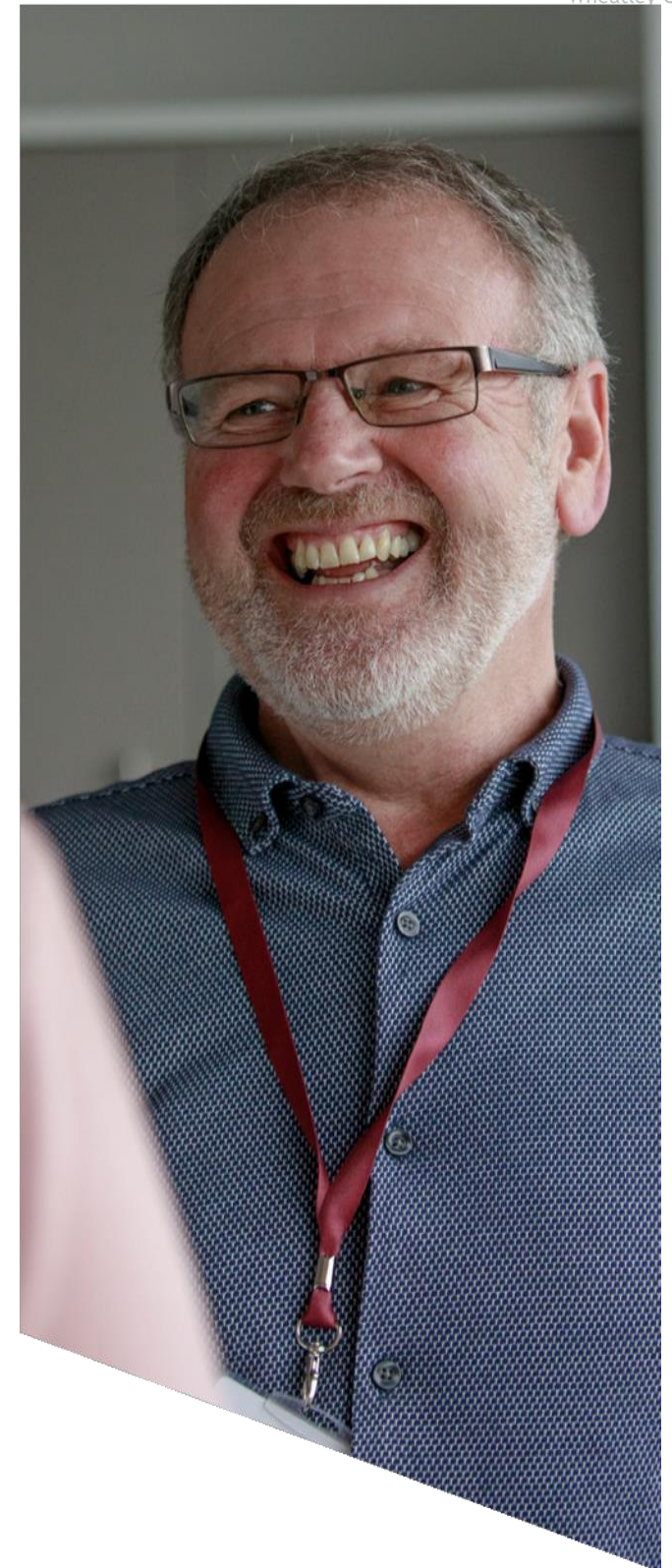
The impact measures will quantify our societal and economic impact and provide evidence of statements made in the strategy. These will generally require periodic evaluation studies to assess the results. Our impact measures relate to the following key areas:

- > **Reducing Poverty and Improving Wellbeing** - This will include tracking the positive impact our support services are making to the overall wellbeing and resilience of the people we work for and supporting their financial situation.
- > **Strengthening our communities** - This will include increasing customers' social capital, expanding our engagement methods and measuring the positive impact this is making to our customers and our communities. We will also track how our increased community cohesion is helping to make our neighbourhoods more 'peaceful'.
- > **Strengthening the Economy** - This will include tracking the impact this strategy will make to the Scottish GDP including the average number of annual FTE jobs created. We will also adapt the social return on investment model with independent partners to assess Wheatley Care's wider impact.
- > **Improving our Environment and Mitigating Climate Change** - This will include working towards reducing the CO2 emissions in our homes and raising the environmental standard of our New Build homes making them more energy efficient and cheaper to run. Within Wheatley Care, our new operating model, blended engagement model and commitment to 'recruit locally for locally' will make a positive contribution to Group-wide environmental ambitions.

### Our values:

As we enter into our new strategy period as Wheatley Care, we will adopt the Group values below:

- > **Excellence** - we raise the bar in everything we do
- > **Community** - people direct what we do and together we build strong communities
- > **Ambition** - we push the boundaries in new ways so everyone can fulfil their potential; and
- > **Trust** - we inspire the people we work for, customers and staff to shape the future.





# 1. CHANGING LIVES AND COMMUNITIES

Changing people's lives and communities through the provision of outstanding care is our core customer and business aim.

Our communities are changing: an increasingly ageing population brings challenges of multiple and complex health issues. We are also seeing an increase in mental health issues and impacts of social isolation on wellbeing. This has been exacerbated by the Covid-19 pandemic which has resulted in increasing levels of isolation as well as poor mental health in many communities across the country.

We will take into account the lessons learned whilst working through the pandemic and continue to evolve our relationship with the people we work for. We will work in partnership with them, wherever possible, to co-design services and ensure a clear human rights based approach.

We will also inspire staff to develop innovative solutions, support learning and build insightful, trusting relationships with the people we work for. This will allow us to deliver highly personalised services to the people we work for, which creates a springboard for them to meet their potential for a brighter future for themselves and their families.

We are operating in challenging times and the people we work for face a variety of challenges every day. The cost of living, low incomes and the impact of cumulative welfare and social care reforms also means that poverty is experienced by more households generally. We will help people with this through close collaboration with our partners in the Group to facilitate skills development and increase opportunities for more affordable living.

Developing new models of support which deliver positive outcomes for the people we work for, and our partners and stakeholders remains a key priority.

The pandemic has further heightened the national policy focus on homelessness. Through our new **Strategic Homelessness Policy**, we will work with our RSL partners in Group to take a leading role in the national agenda around Rapid Rehousing and Housing First for those who have been homeless, supporting the Scottish Government and local authorities in their plans.

We will prevent homelessness wherever possible, design services that meet the needs of people

that experience homelessness and develop sector-leading approaches that demonstrate good practice at a national level.

The group will increase the amount of homes that go to those who are already homeless. This will be done in a way which builds the strength and resilience of the new households and the surrounding community. Our work with people who have lived experience of homelessness to map their customer journeys will be used to direct our services in the way which works best for this customer group and the wraparound services they need. This will involve the redesign of our internal tenancy support services to strengthen our models of support ensuring our RSL partners achieve their targets around tenancy sustainment. The insight this provides will help us lead the way in strengthening the pathways for homeless people to ensure they can access the support they need easily and at the time they need it.

Working with Wheatley's RSLs, we will help to shape the new Livingwell house type. This will allow us to expand our Livingwell product beyond our current offering for those over 55. We will also work as enablers to support a range of groups to combat loneliness and make wider social and community connections. We will explore the feasibility of expanding our Livingwell model and its suitability for implementation on a wider scale to support the Scottish Government to meet national outcomes to support our ageing population.

Over the life of this strategy, we will develop new digital products and solutions, evaluating their impact on service delivery and how they enhance the lives of the people we work for. However, our services will always have a human face and we will ensure no-one is left behind. Over the next five years, the offerings from our **Technology Enabled Living** range will be expanded. We will continue to work with our RSL partners taking a pro-active and strategic approach to technology as a key enabler. We will also encourage the people we work for to engage with us in a variety of ways to ensure that this technology continues to have a positive impact. Taking this joined-up approach, we will help people better manage and control their own living and care arrangements, maximising benefits for all stakeholders including the people we work for.

We will offer mentoring support to the people we work for, with support for carers a particular focus. We will grow and expand our offer around volunteering in parallel with working to create jobs, training and apprenticeships for those who wish to explore these opportunities. This will lead towards a bespoke volunteering programme linked to an end point of accreditation.

The safety of the people we work for as well as our assets will remain a strong focus for us. We will work with our RSL partners and external providers to ensure we have the best quality fire safety provisions helping to reduce the incidence of fires. We will also work closely with Group RSLs to design accommodation which meets the changing health and care needs of our customer groups.

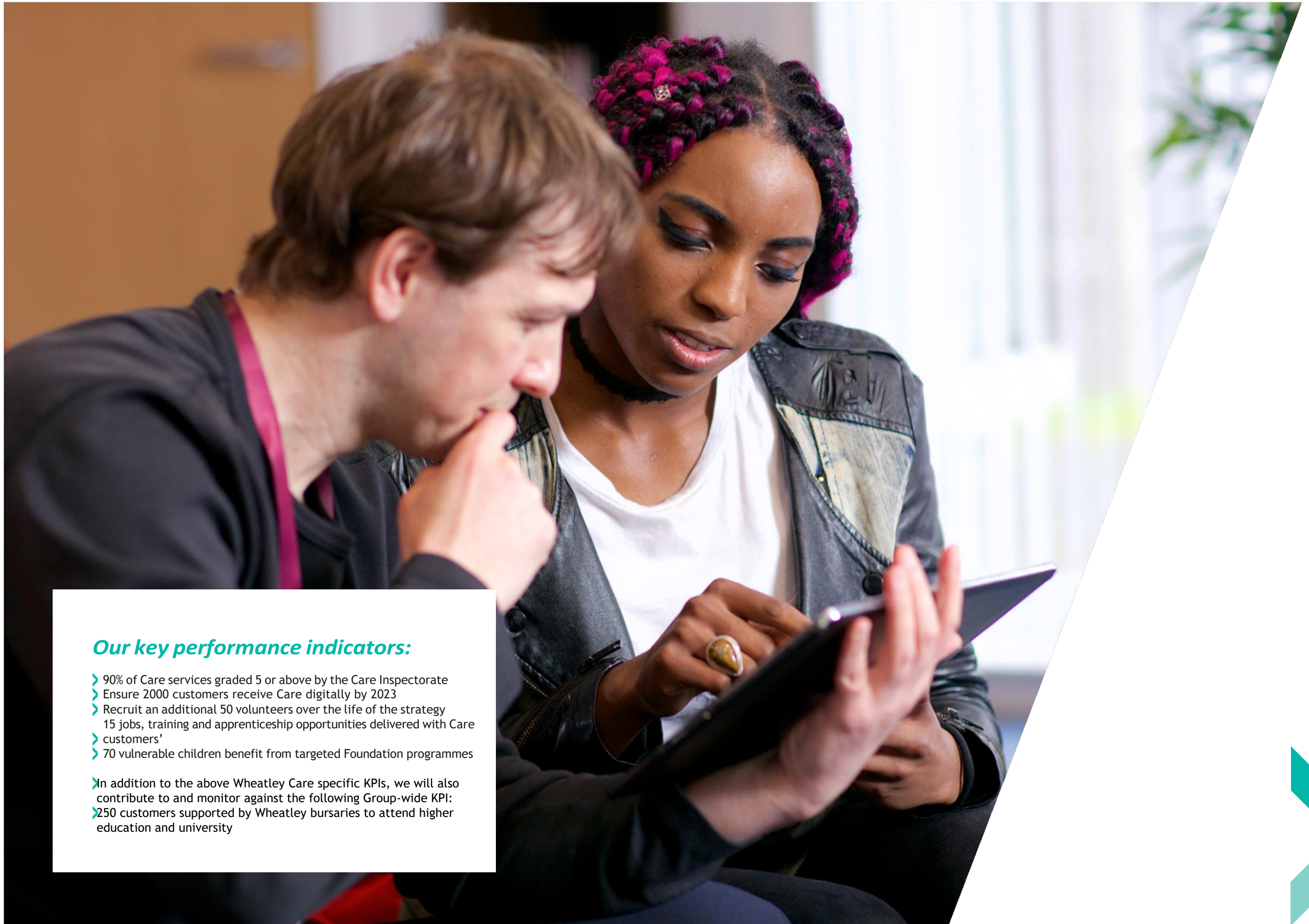
## We will do this by:

- › Supporting further development of Group-wide approaches to homelessness prevention and support
- › Reviewing and expanding Livingwell developments in recognition of the increasingly diverse needs of households across our communities.
- › Exploring the further potential of deployment of technology across our services and customers of Group.
- › Ensuring the evaluation of technology impact, including involvement of the people we work for through projects to explore technology enabled care
- › During the last strategy period, Wheatley Care was transformed, increasing its footprint and reach across Scotland. We will continue to target measured growth opportunities where we believe we can deliver excellent personalised services. We will specifically focus this in areas where the Group is both landlord and Care provider as it gives us an opportunity to demonstrate our unique Group offering of integrated services, a recent example being the acquisition of the Bellgrove Hotel in Glasgow.

We will demonstrate Wheatley Care's progress towards the outcomes under **changing lives and communities** through the following key performance indicators.







### ***Our key performance indicators:***

- › 90% of Care services graded 5 or above by the Care Inspectorate
- › Ensure 2000 customers receive Care digitally by 2023
- › Recruit an additional 50 volunteers over the life of the strategy
- › 15 jobs, training and apprenticeship opportunities delivered with Care customers'
- › 70 vulnerable children benefit from targeted Foundation programmes

› In addition to the above Wheatley Care specific KPIs, we will also contribute to and monitor against the following Group-wide KPI:  
› 250 customers supported by Wheatley bursaries to attend higher education and university



## 2. DELIVERING EXCEPTIONAL CUSTOMER EXPERIENCE

Excellence is embedded in Wheatley Care's culture; but we now want to build on this foundation to deliver even more outstanding services to the range of customer groups we work with and for.

Our customers include the people we work for, the organisations who commission our services, and our Group partners with whom we work with to add our unique value to the Group's strategic ambitions. Care's vision is that services are easy to access and feel personal and seamless. Our focus is the experience of the people we work for, ensuring they fully capitalise on, and recognise, the value of the entire package we offer.

Co-designing the transformation of our services with our customers will ensure no one is left behind. Our new engagement framework, "**Stronger Voices, Stronger Communities**" will place the people we work for, their families and our stakeholders at the heart of how we plan and design our services. This includes thinking differently about how we communicate our offering as well as providing support to help build and improve digital skills. We will encourage them to influence and shape our services in a variety of ways, offering opportunities and choices around how they are delivered. We will continue to develop and apply approaches which are evidenced to have greatest impact. This will provide scope for us to better understand the experiences from the perspective of the people we work for in parallel with the collection of well-being information.

Throughout the life of the strategy, we will focus on prevention and early intervention to deliver the best possible service to the people we work for.

We want to offer quick resolutions to issues which affect how satisfied people feel with our services. We will build ways for people - both the people we work for and stakeholders - to engage in the initial development and review of services.

We encourage commissioners and innovators to influence and drive our digital evolution. This will help us co-design and deliver innovative solutions for both the Care sector and to meet the needs of the people we work for. Importantly, we will ensure that each connection feels personal whether delivered digitally or face to face. We will also work with commissioners to influence the tailoring of services.

Across Group, we will work collaboratively to share our care knowledge, helping to shape services and develop staff awareness and optimising the customer experience right across Group. We will also work with external partners and stakeholders to anticipate the profile and demography of our future customers as well as the issues they may face in 2026 and beyond.

As part of our strengthened approach to equity, diversity and inclusion, we will ensure staff and customers' lived experiences shape our services. We will encourage a diverse range of the people we work for to talk to us about their experiences and the issues that matter to them encouraging them to challenge our performance and outcomes.

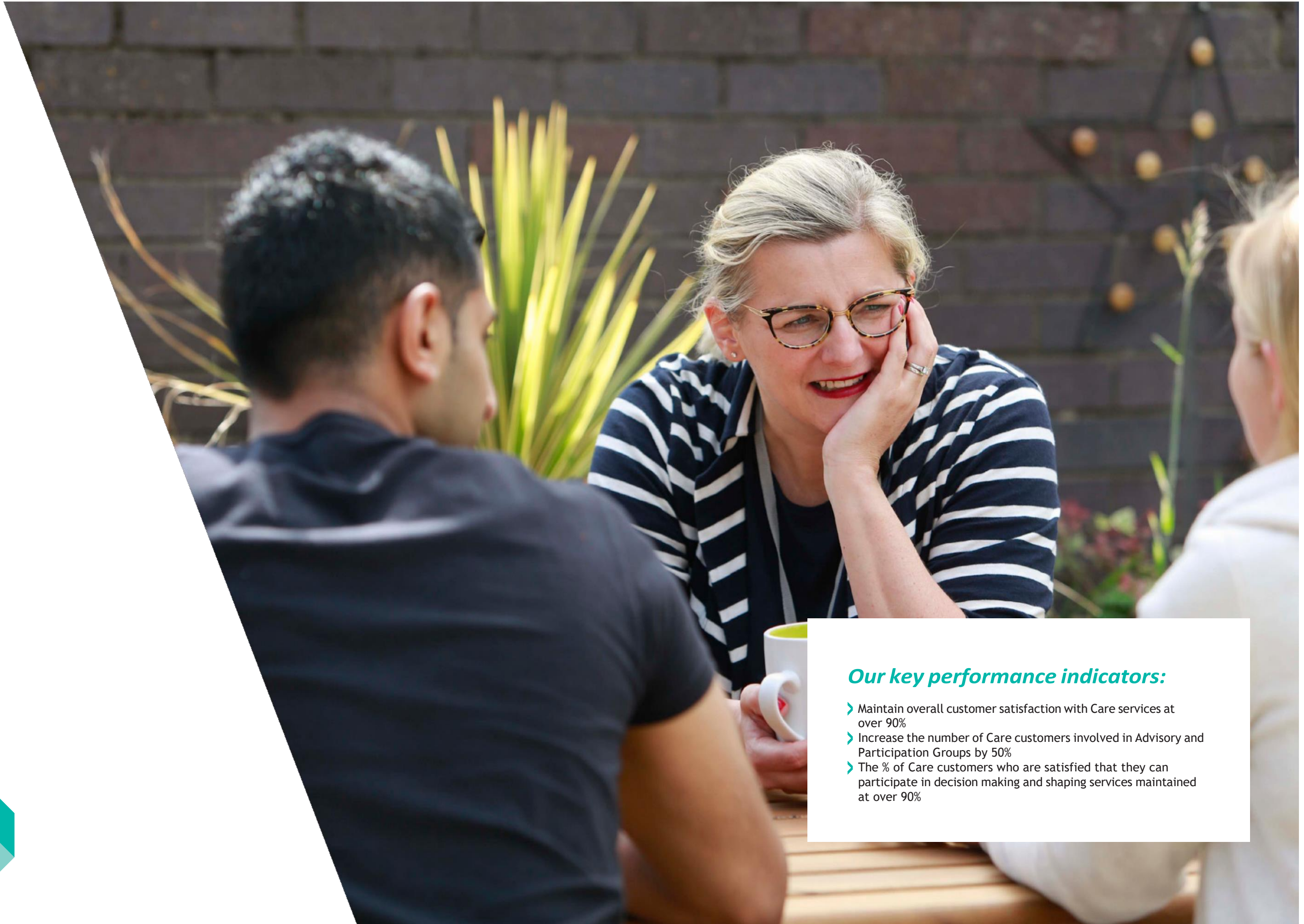
### We will do this by:

- Prioritising a suite of performance indicators which are important to our stakeholders and the people we work for
- Reviewing our communication strategy method and frequency with the people we work for to ensure our customers are aware of the current service offer available to them
- Bringing data together so that we have a fuller picture of the people we work for
- Developing a co-created performance framework with stakeholder-led measures and targets to ensure we are delivering what matters to the people we work for and commissioners of our services

We will demonstrate Wheatley Care's progress towards the outcomes under **delivering exceptional customer experience** through the following key performance indicators.







***Our key performance indicators:***

- › Maintain overall customer satisfaction with Care services at over 90%
- › Increase the number of Care customers involved in Advisory and Participation Groups by 50%
- › The % of Care customers who are satisfied that they can participate in decision making and shaping services maintained at over 90%





### 3. MAKING THE MOST OF OUR PEOPLE, OUR ASSETS AND OUR SERVICES

Our people are our greatest asset. Recruitment and retention in care is challenging due to competition in the wider employment market for dedicated, reliable and caring people in sectors which do not have such a complex funding landscape. Our ambition over the next 5 years therefore is to stimulate innovation and learning for our workforce, enabling them to reach their potential for a brighter future. **W.E. Work** will deliver the transformational changes to our roles and operating model required to ensure our strategy is delivered.

Maximising our offering as an employer to recruit and retain skilled staff, is central to meeting the needs of the people we work for as well as the business going forward. Not just supporting young people into training and jobs but supporting employability at all ages. Recognising this richer and more resilient workforce, which is always learning will reap benefits for Wheatley Care, making us a more agile organisation.

Over the lifetime of this strategy we will not only comply with the different and complex requirements for different service types, but will strive to use our expertise in the sector to go over and above this. Leaders will collaborate with staff and external stakeholders to ensure that we fully capitalise on this shared expertise and collective strength, building on our organisational culture.

We already have considerable expertise in managing a high performing, agile and mobile workforce focussed on finding solutions for the people we work for. This was further strengthened during our experiences of working in the Covid-19 pandemic and we will continue to support our people, giving them the confidence they need to successfully develop new, and more effective ways of working. This will include ensuring that they have the transferrable skills needed to become highly skilled in building and managing relationships. Another important aspect to this will be to ensure staff have reflection and learning time integrated into their working environment.

Our priority will be on **'growing our own talent'**; spotting the potential of a person and supporting them to develop skills for the future. This will include training and building the capacity of our future leaders, both for those who wish to develop a professional career in care whilst supporting others to follow their pathways throughout the Group. This will enable us to benefit

from greater synergies across care and housing as well as identifying opportunities for joint working.

We anticipate that a significant percentage of our workforce will be over 50 years of age by 2026. As a result, succession planning and talent pipelines that maximise employment and career opportunities across the diversity of our work roles, will continue to be a priority. In addition, we will work to improve the diversity of our workforce and will recruit from within our tenant base, providing opportunities to wider Group customers.

Our Future 250 programme will provide a sought-after route for young people to develop their talent, attracting an external talent pipeline for our evolving business requirements. We will work with our Wheatley partners to help provide structured opportunities within Care for these young people to build their skills and experience portfolio, honing their talents and demonstrating their potential.

Our **W.E. Create** approach will drive innovation across all aspects of our business and in our communities. We will generate new ways of supporting entrepreneurship and collaboration. These will bring together the people we work for, staff, stakeholders, social enterprises and new local businesses in flexible spaces that look and feel very different from traditional offices. Care customers will also benefit from a wide range of ways to co-create with us, shaping opportunities available and driving changes. Creating the right environment and opportunities for our staff and the people we work for to learn together will therefore help to re-enforce our **"Think Yes Together"** culture.

Harnessing the right technology will make life better for the people we work for and will support them to live more independently. We will continue to pioneer new products, evaluating them against the needs of the people we work for and their wellbeing.

Wheatley Group will be building up to 3,400 new homes and undertaking investment in existing homes. We will bring our knowledge of the changing housing needs of the people we work for, contributing to the shape of the new build and investment programme, influencing the type, design and technology that has the potential to others nationally and internationally to enhance our knowledge.

Nationally and locally, we know priorities for asset-based support services are changing. We will use our expertise to feed into the review of accommodation-based care assets across the Group contributing to the Group's Asset Strategy. This includes assessing the possible future of services delivered in supported housing models and considering options for how we can use these assets differently. We will evolve the way we work to ensure our services provide for the needs of the people we work for, our partners and stakeholders in this new environment.

We are proud to be an **ethical organisation**, both in what we do and how we do it. We need to future-proof our assets so that they contribute to emission reduction, are environmentally sustainable and offer value for money in future years. We will set ourselves apart by being an ethical employer, paying our staff fairly for their hard work and commitment, and by offering a range of benefits of being part of the Group.

We are committed towards creating a working environment that is inclusive for everyone. Our Different Together campaign will help to promote our equity, diversity and inclusion focus both for staff and with our customers and communities.

We will do this by:

- Reviewing our operating model to ensure that we are competitively placed in the market whilst continuing to deliver excellent services for individuals
- Developing a pipeline of future leaders
- Supporting all age learning, reskilling and employability where appropriate for the people we work for, and for our own staff
- Ensuring the effective recruitment and retention of staff through reward and recognition
- Maximising the use of digital learning and education to ensure all staff have access to the full suite of learning resources at a time that suits their agile working arrangements
- Feeding into the review of accommodation-based care assets across the Group to ensure buildings are configured to meet the needs of the current and future people we work for
- Utilising work environments and community hubs that support flexible working, innovation and engagement.
- Formalising our National Living Wage employer status
- Enabling the people we work for to access the package of services available by being part of Wheatley Group e.g. utilising opportunities for more affordable living via MySavings, which can support more affordable fuel and broadband connections.

We will demonstrate Wheatley Care's progress towards the outcomes under **making the most of our people, our assets and our services** through the following key performance indicators.





### ***Our key performance indicators:***

- › Over 90% of staff say they feel appreciated for the work they do
- › Staff absence maintained at 5%
- › Staff turnover comparable or better than the SSSC's benchmark
- › 40% of promoted posts filled with internal candidates
- › 65% of Care staff will hold a current SSSC qualification or be working towards one at all times
- › In addition to the above Wheatley Care specific KPIs, we will also contribute to and monitor against the following Group-wide KPIs:
  - › 50 graduates provided with opportunities to work and gain experience in our sectors
  - › 250 young people provided with structured opportunities to build their skills within the business.





## 4. ENABLING OUR AMBITIONS

We are operating in challenging times; the people we work for are facing increasing financial constraints and the care sector is operating in a fluid funding environment. More stability is needed to develop the skills and sustain the continuous improvement we all want to see in the service provision for the people we work for. Whilst we recognise the need to be an efficient business, we will continue to work with partners to ensure **quality is foremost in all of our services**.

By 2026, we want our customers and our communities to be more resilient. Universal Credit and the impact of cumulative welfare reforms mean poverty and inequality is being experienced by more households. As part of Wheatley Group, we will continue to improve the lives of the people we work for and our communities. To do this we will identify their priorities and raise our collective voice to influence change to benefit their lives, advocating on their behalf.

Technology and digital innovation will continue to enhance the work performed by people within the organisation by integrating productivity and automation tools. Data and information will play an increasingly important role in enabling the delivery of all aspects of our services. Through process improvement and smarter utilisation of our digital platforms, and ongoing implementation of our Group data strategy, we will improve our efficiency and service capabilities. We will upgrade and embed our Care customer management system to ensure all Care staff have access to the information they need at the time they need it.

We also take into account the role that technology can play in our service offering, ensuring this is a key feature in our selection of new business opportunities. Technology has made a significant impact on our business as evidenced in the quotes below:

### Agnes Pennie (Customer):

“Livingwell with Alertacall provides me with peace of mind that someone is there at the other end, if I need them. As an older person, using technology can be daunting, but the Touchscreen is such a simple and straightforward system. It gives me a sense of security without inhibiting my independence. I love my new flat and the new lease of life that comes with it!”

### Craig Bruce (Care Technology Lead):

“Ongoing investment in care technology has allowed us to build the foundations needed to deliver a fully mobile workforce and customer facing platforms that will put control into the hands of the people we work for over the term of this strategy. Work to date has given staff mobile access to a full suite of Office 365 applications, allowing them to communicate more effectively and conclude support actions at the point of service delivery. Additionally, remote access to our Group intranet site and learning management system means our staff have access to the information and training they need to meet regulatory and contractual obligations.”

### Janet Haigh (Service Manager):

“This has ensured that we have been able to provide support to the people we work for, supporting individuals with their health and wellbeing and also keep lines of communication open amongst the wider MDT (Multi Disciplinary Team) allowing us to be able to provide support when individuals required, combating social isolation for individuals with complex needs. It has allowed us to keep communication lines open and staff being able to develop within their role has played a key part in staff training. Staff health and safety has also been a priority working within the wider community, ensuring staff have the correct tools. Supporting individual to contact family and friends has also played a key part in social isolation. Staff being able to attend supervision/team meeting from home has kept clear communication within staff teams. Staff being able to access wrap around service for individuals as and when this is required

The formative years of this strategy will ensure we build a strong technology foundation by enhancing the functionality of our care platform and introducing mobile apps to enable staff to work more flexibly. We will then explore the opportunities for self-service solutions, putting the customer in control and delivering even greater levels of customer service. This will be complemented by the use of call centre technology to support the people we work for 24 hours a day, seven days a week.



Fundamental to our future success will be reviewing and refining our **Care Business Framework**. This will allow us to strategically prioritise and identify new opportunities for growth and partnership working helping Wheatley maintain a strong credit rating and managing financial risks. Our Care Business Framework is based on sound principles such as quality of service provision, a 7.5% management fee and full cost recovery. We fully assess the cost benefit of any potential tenders and risk assess the opportunity ensuring we are financially prudent. We will test our business plan against a set of financial golden rules and ensure we have mitigating actions ready to address a wide range of adverse scenarios and stresses. This includes regularly reviewing our strategic and operational context, which differs between our areas of operation. Central to this will be closer working with Health and Social Care Partnerships and local authorities. This will ensure our priorities and offerings not only align with theirs, but that we have a structured opportunity to influence the future direction of health and social care priorities in the interests of the people we work for.

Our success over the last five years has ensured Wheatley has been accepted and recognised as a force for good in Scotland. Building on these strong foundations, Wheatley Care is well positioned to confidently and deliberately take a leading role on the UK and international stage influencing locally and nationally to benefit the people we work for. For example, we have been actively involved in the **Adult Social Care Review** with a specific focus on procurement and funding of services.

Our staff will increasingly showcase our solutions and successes, collaborating with others to develop new thinking that benefits the wider sector. We will continue to work with our Group colleagues to assess the impact our activities have on the strategic priorities of our

stakeholders. We will also adopt a formal approach to demonstrate our impact based on the social return on investment model, which will cement our reputation as thought leaders, helping to drive up standards across the sector for the benefit of the people we work for.

We will do this by:

- Upgrading and assessing the effectiveness of our Care IT system
- Undertaking research on the value of our activities on the strategic priorities and expenditure of our partners, the public purse, and the wider impact on peoples' lives
- Developing a structured engagement and influencing programme with partners, articulating the outstanding service offering and impact we currently have and which we could grow e.g. Health and Social Care Partnerships, Health sector, local authorities, Scottish Government
- Implementing Board and staff training on assessing the impact of policies or new initiatives on different customer segments

We will demonstrate Wheatley Care's progress towards the outcomes under **enabling our ambitions** through the following key performance indicators.





### *Our key performance indicators:*

- › Grow Self Directed Support income by 10% over the life of the strategy
- › Increase the number of Livingwell units in the Group by 20% over the life of the strategy
- › Retain 90% of contracts that are retendered
- › 96% of Care services at financial break even after management fees

In addition to the above Wheatley Care specific KPIs, we will also contribute to and monitor against the following Group-wide KPIs:

- › Wheatley Group maintaining a strong investment credit rating of A+ stable





<https://www.wheatley-care.com/>

Our values are what unites everyone at Wheatley



We can produce information on request at no cost in large print, in Braille, on tape or in another non-written format. We can also translate this into other languages. If you need information in any of these formats please call us on 0800 952 9292 or email [info@wheatley-group.com](mailto:info@wheatley-group.com)

Możemy, na życzenie, bezpłatnie przygotować informacje dużą czcionką, w alfabecie Braille'a, na taśmie lub w innym niepisanym formacie. Możemy je również przetłumaczyć na inne języki. Jeśli potrzebujesz informacji w którymkolwiek z tych formatów, zadzwoń do nas pod numer 0800 952 9292 lub wyślij e-mail na adres [info@wheatley-group.com](mailto:info@wheatley-group.com)

Podemos produzir informações mediante solicitação e sem custos, em impressão grande, Braille, cassete ou noutro formato não descrito. Também podemos traduzi-las em outros idiomas. Se precisar de informações em qualquer um destes formatos, contacte-nos através do número 0800 952 9292 ou envie um e-mail para: [info@wheatley-group.com](mailto:info@wheatley-group.com)

يمكننا إنتاج معلومات عند الطلب مجاناً مطبوعة بأحرف كبيرة أو بطريقة برايل أو على شريط أو بتنسيق آخر، غير مكتوب. يمكننا أيضاً ترجمة هذا إلى لغات أخرى. إذا كنت بحاجة إلى معلومات بأي من هذه التنسيقات، فيرجى الاتصال بنا على 0800 952 9292 أو إرسال بريد إلكتروني إلى [info@wheatley-group.com](mailto:info@wheatley-group.com)

در صورت درخواست، می‌توانیم اطلاعات را در چاپ بزرگ، خط بریل، روی نوار یا در فرمت غیرنوشتاری دیگری ارائه دهیم. همچنین می‌توانیم اطلاعات را به سایر زبان‌ها ترجمه کنیم. در صورت نیاز با ما تماس بگیرید 0800 952 9292 به اطلاعات بیشتر در هر یک از این فرمت‌ها، لطفاً از طریق شماره ارسال کنید [info@wheatley-group.com](mailto:info@wheatley-group.com) یا ایمیلی به

ہم درخواست پر معلومات کو بڑے حروف، بریل، ٹیپ پر یا کسی اور غیر تحریری صورت میں بغیر کسی لاگت کے مہیا کر سکتے ہیں۔ ہم اس کا دوسری زبانوں میں ترجمہ بھی کروا سکتے ہیں۔ اگر آپ کو ان میں سے کسی صورت میں یہ معلومات درکار ہوں تو برائے کرم ہمیں 0800 952 9292 پر کال کریں یا [info@wheatley-group.com](mailto:info@wheatley-group.com) پر ای میل کریں۔

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