



... a new strategy for a new era

Our Mission Statement

We are committed to helping and supporting vulnerable people to establish and sustain their well-being and quality of life. We do this by working with our partners, by building confidence in those we support and by accessing resources that can help facilitate lasting change.

We are the small charity that makes a big difference.



The small charity that makes a **big** difference.

Introduction by our Patron

I am proud to be associated with this small but vibrant charity whose innovative and imaginative work I have come to respect hugely. After all, it seeks to address a fundamental human need. And it does this with real commitment.

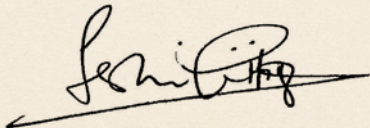
Good, comfortable and secure housing gives people of all ages a foundation on which to build and sustain their lives. Unlike many parts of Europe, the United Kingdom's housing stock is predominantly owned by the people who live in it, rather than renting in the private or public sectors.

Even for those who have money on paper in the value of their homes, old age and failing health can leave them unable to afford the support and help that they need.

As a relatively small charity, we can't help all those in need, but can channel our money and energies in a way that achieves the best results for our beneficiaries. Having celebrated our 20th anniversary in 2009, we have taken the opportunity to look back on what we have achieved so far and to look forward at what are able to do in the future.

This strategy document summarizes the outcome of our deliberations and outlines a future direction for the Trust for the next five years. Nothing is set in stone, as we live in a fast-changing world, and must respond and react to circumstances as we find them. The research project commissioned from Riseborough Research & Consultancy Associates will help inform our future activities and provide an evidence base for any new initiatives that we might launch.

Our discussions with the Orbit Group are ongoing, as they decide on their strategy to 2020, and the trustees will reflect any proposals for joint working that emerge in the next review of this document.



1. Orbit Charitable Trust Story

- 1.1 The Orbit Group can trace its origins back to 1966. It started with a small number of co-ownership projects, but grew quickly both in size and range of housing. By 1989, it was felt the time was right to establish a new body which would be the charitable arm of the Group and Orbit Charitable Trust (OCT) was formed, with its objects being:

'To promote any charitable purpose in England and Wales and particularly to provide improved housing conditions and associated amenities for persons in necessitous circumstances upon terms appropriate to their means, thereby improving the quality of life of such persons.'

- 1.2 Although legally independent, OCT maintains links with the Orbit Group through funding and partnership working, and provision of services. This relationship may develop further as both organisations complete their individual strategy reviews and continue to fulfil the ethos of supporting vulnerable people and targeting genuine hardship cases.
- 1.3 As Orbit Group has changed over 20 years, so has the Trust. OCT has added alternative funding streams outside of Orbit which has enabled us to make significant grants to organisations and individuals throughout England.

2. Who We Are

- 2.1 Although a relatively small charity, through the focus and dedication of our trustees, OCT has been able to make a real difference to people's lives, contributing beyond its size and resourcing capacity. The current trustees are:

David Hucker (Chairman)

Jim Lord

Elizabeth Phillips

Michael Stevens

- 2.2 Underpinning the Trust's work is a sound governance structure, based around:



3. What We Do

- 3.1 The aim of OCT is to support vulnerable and marginalised individuals and communities in order to sustain their well-being and quality of life. We do this through the provision of grants, the telephone alarm service, working partnerships and by supporting other agencies.

3.2 We meet our overall aim through:-

- Supporting Orbit Group's Care and Repair services by helping clients (who are usually elderly or disabled) with grants for home improvements or adaptations, so they can continue to live in their own home.
- Our involvement with the Group's Supported Housing Projects which cater for residents with a variety of special needs.
- Our grants programme

3.3 The bedrock of our work has been the making of grants, often for relatively small amounts, that can change people's lives. The process is simple and speedy and, in urgent cases, we can give a decision within 48 hours through the scheme of delegation. The majority of grants have been to customers of Orbit Group, but we have also supported other applicants and national charities such as the Housing Associations Charitable Trust (HACT) and Care and Repair England.

Irrespective of OCT's future direction of travel, our grant making activity will remain a key feature of what we do.

3.4 Applications are considered against the following criteria:-

- Grants are subject to a maximum of £500 (£1,000 for those falling within the Orbit Designated Fund)
- Grants must be taken up within three months of approval
- Applications must be received via a sponsoring body, such as a community-based charity or organisation, with the beneficiary clearly identified
- Applicants should show match funding or other bodies that have been approached for assistance
- Full documentary evidence of the need for a grant and quotations must accompany the application
- Applications must be for "added value" not renewals or replacement

3.5 OCT also acts as Corporate Trustee for two almshouse properties in Kettering (The Edmund Sawyer Almshouses).

3.6 In collaboration with Warwick District Council, we operate a community telephone alarm service. This service is a joint venture that involves renting telephone alarms to vulnerable people in the community.

4. The Challenges

4.1 OCT responds to the often urgent needs of vulnerable people through the provision of grants and through the community telephone alarm scheme. Our grants process ensures that people in need can be supported quickly and efficiently with a minimum of waiting. Whilst we will always be there to help the most vulnerable individuals, we know there is still more to do.

- 4.2 In our desire and commitment to develop as a charity, a key challenge for **OCT** is the many other agencies competing alongside us for funding and sponsorship. As a complementary exercise to this review, we are developing a fundraising strategy to take the Trust forward in the new areas of work that it is considering.
- 4.3 Partnerships and collaborative working is the way forward and **OCT** recognizes the need to develop this approach in order to continue serving and meeting the changing and increasing needs of our target groups.
- 4.4 **OCT** aims to reach all vulnerable groups – however the nation is getting older and need better prevention action and earlier care. The poorest areas too often with the poorest health and the poorest care are hard to reach and at **OCT** we are committed to address this, using the findings of our research project to inform our approach and our strategic direction.
- 4.5 The project, commissioned in conjunction with Age UK Warwickshire and being carried out by Riseborough Research & Consultancy Associates is entitled:
- “Housing and Care for the Most Vulnerable Older People. What can Housing Associations and Older People Organisations do Together?”*
- The results will help shape our future development as an organisation.
- 4.6 **OCT** will not meet all these challenges alone. However, these challenges inform the drive and focus of our strategic development and action plan.

5. National and Local Context

- 5.1 Recent research from the Housing Associations Charitable Trust (HACT) shows that:-
- Despite apparent improvements over the past 50 years, the majority of social housing tenants are socially excluded, many are unemployed and some live in poverty.
 - Over 40% are over 60 years of age and many have support needs.
 - In addition even more people living on low incomes are in living in the private rented sector.
 - Two-thirds of older people on low income are home owners.
 - The direction of Government policy in respect of social housing, coupled with planned cuts to Supporting People and other services will inevitably impact hardest on vulnerable people and the poorest communities.
- 5.2 As a society, we can take a measure of our collective health by looking at the way we treat the most vulnerable amongst us, for example, homeless people, the frail and aged, people with a disability or those who live with mental illnesses.
- 5.3 When **OCT** was founded under the chairmanship of Ron Crewes, it went beyond the remit of Orbit and aimed to match improvements in poorer people’s physical living standards by offering support which allowed them a greater sense of well being.

- 5.4 For the last 20 plus years, OCT has worked successfully and consistently with a range of agencies, and individuals making a lasting change for vulnerable groups, many of whom are living at the margins of society. During that time, our beneficiaries, both organisations and individuals, have received over £600,000 from the Trust, which has contributed to community projects and individual support.
- 5.5 As part of OCT's commitment to addressing the wider agenda, we have embarked on the large research project (see 4.5) to more clearly understand the national picture for older people and local communities.

6. Developing The Trust – Existing Areas

6.1 To date, OCT's focus has been driven by the passion and expertise of a handful of people. OCT has facilitated opportunities for individuals and organisations that have been a lifeline and created change and independence for many vulnerable individuals and communities. The future focus for the Trust needs to be agreed by the Trustees and needs to cover a range of development opportunities to enhance and expand the organisation building on the firm foundations already in place.

6.2 Map and Develop a Fundraising & Marketing Strategy

A key priority for the Trust will be to explore opportunities to grow through increasing fundraising and marketing. Given our size, there will first need to be an agreed platform for the organisation to structure its fundraising. The proposed model for OCT would consist of a range of fundraising sources, such as:-

- Grants, Trusts and Foundations
- Major Gifts
- Sponsorship
- One off events in collaboration with a complimentary charity
- Facilitating fundraising opportunities with Orbit Group
- Marketing of OCT interlinked to strategy
- Targeted Charity of Year Status

Our trustees and director cannot undertake the challenge of fundraising effectively in isolation, hence champions and partners will need to be created as part of a fundraising agenda and this will be an essential ingredient to the future success of identifying funding streams.

6.3 Develop and extend the Community Telephone Alarm Scheme.

We are currently developing promotional material to further enhance the potential of this scheme. However, due to changes in technology, it may be that the Trust explores developing this project and interlinking with mobile phone capability and national marketing and sponsorship opportunities.

6.4 Develop Almshouse Management Role and Trust Support

As experienced and established Corporate Trustees, we are more than able to develop a role helping other trusts to manage almshouses and further supporting other trusts by providing:-

- Consultancy services to independent trusts
- Acting as a Corporate Trustee to administer trusts where trustees no longer exist
- Accepting transfers of engagement from trusts and exempt charitable housing associations not registered with the Tenant Services Authority.

6.5 Develop our relationship with Orbit Group

The recent appointment of our director offers an opportunity to further develop our long-standing relationship with Orbit including :

- Agreeing a compatible and complimentary fundraising programme
- Developing a profile of both partners
- Facilitating learning through project programmes
- Enhancing opportunities to upskill and improve relations with the Third Sector to enhance independence of Orbit's tenants
- Developing resources to improve access to services in community
- Provide facilitation role for developing model of Community Hub

It is timely that Orbit Group is carrying out its own strategic review and we welcome the opportunity to be part of its stakeholder consultation.

7. Developing The Trust – New Areas

7.1 Our research project should provide information and direction to guide the charity to explore new areas that could service development potential.

7.2 Dementia

The emerging crisis of dementia care in the current climate could present a development opportunity for OCT in some of the following areas:-

- Assistive Technology in the community as specialist community alarm service
- A Dementia programme based on the findings from the research
- Collaborative links with other agencies offering information and advice on housing needs for people living with dementia or with early stage dementia who do not qualify for statutory support.

Some of this work would be outside of the scope of our current level of funds and require us to secure specific sponsorship.

7.3 Virtual Hub

Our current research project could be used to develop appropriate mechanisms for disseminating findings and sharing expertise and learning. If the Trust develops a strategic programme of project development, there will be the opportunity, through working with other groups, to co-ordinate national and regional events to disseminate information and act as a networking or umbrella organisation to facilitate debate, share expertise and good practice.

Organising and co-ordinating regional and national conferences could also offer potential funding streams to support the grants programme. Using its research, skills and expertise, OCT has an opportunity to identify gaps in service provision and expand and develop a lead specialising in the provision of training, debating and facilitation and research dissemination.

7.4 Home Improvement Agencies/Care & Repair

Government strategy and the economic climate is already forcing their hand with some 20 having closed since January 2011. A "Back to Basic Approach" to link housing conditions to health in collaboration with partners, could be the focus of a major campaign.

7.5 Leading the national debate

Whilst OCT currently helps to bring about change to people's lives and, through our research project will be contributing to developing thinking on tackling issues faced by older people within society, we want to do more. The Government has announced the need for the third sector to play a stronger role in enabling and strengthening communities and in designing and delivering public services. OCT's research will be instrumental in representing the voices of older people in relation to housing issues for the future.

We can go further by playing a major part in the national debate to bring about change on behalf of individuals and communities and particularly marginalized groups who find it difficult to access and influence decision-makers. Such a role must, however, be balanced with our core aims and activities around direct and targeted support to vulnerable people who come to us for help.

