



Housing and
Communities



Bigger than Business:

Housing associations and
community investment in
an age of austerity

Extended research report
Volume II

**Anne Power, Eileen Herden,
Bert Provan, Laura Lane, Nicola Serle**

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This report forms part of a series of documents on the outcomes of a study commissioned by Orbit, which assessed the contribution of social landlords to the stability and well-being of low-income residents in disadvantaged communities alongside their contribution to society and the economy as social innovators, entrepreneurs, builders and community anchor organisations. Volume II is the extended research report, providing more information on the study, including detailed results from the fieldwork. It supplements the Summary; Volume I (overview); and Volume III (supplementary information). All documents are available on the LSE Housing and Communities, and Orbit websites at:

<http://sticerd.lse.ac.uk/LSEhousing/>; www.orbit.org.uk

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Part 1: What LSE Housing and Communities set out to do, and how we did it

Chapter One: Background to the LSE project

Housing associations provide over 2.5 million subsidised rented homes in a housing context that has changed almost beyond recognition over the last 20 years – loss of government grants, reduced housing benefit, borrowing restrictions, low house building rates, greater social polarisation, higher demand, bigger affordability problems. LSE Housing and Communities is exploring how tenants of social landlords are faring in this new climate.

Housing associations have no choice but to respond to the pressures from the bottom – their tenants – in order to retain reasonable conditions and fulfil their social mission that traditionally generated wide public support. Yet housing associations are social businesses that must also balance their books, pay their way and create affordable new homes when and where they can. This poses serious dilemmas for large associations, which want to borrow to build, but need to cut management costs in order to do so.

This study sets out to discover how Orbit's social roles play out on the ground: do tenants value the social investments their landlord and other partners make? What are the most essential and cost-effective activities? How can social landlords meet need at all levels – in supply, in management, in services and in partnership? We asked 120 tenants, 32 staff and 18 community leaders in three areas why the social and community role of housing associations is so important. How can it be done better? How can it work in a time of cut-backs? And what can be done to make it work more effectively?

Over the last decade, housing associations have become vital actors in poorer neighbourhoods where most of their rented property is concentrated. They are in a strong position to play a vital role in helping low-income communities through difficult times. Housing associations are anchored in the community in the same way as schools are, but developers and political leaders are not. How can they use their privileged access to local residents in ways that will have the widest societal impact? What are the costs and the benefits? What is their unique contribution?

Orbit's need for research into social investment

Orbit commissioned LSE Housing and Communities in December 2011 to investigate a sustainable framework within which Orbit can contribute to communities and society as a whole in a climate of severe resource constraints. Orbit already provides many social and economic support services to its customers, some systematically (e.g. sheltered housing), many in an ad-hoc fashion by responding to need, and many in partnership with other bodies. But it may need to expand its social and economic provision to help its tenants meet the new challenges of resource constraints. In order to do this

effectively Orbit will need to clarify the routes available. Different solutions may be required in different places, for example in urban vs. rural, and concentrated vs. scattered communities. Orbit has a varied and scattered stock and has evolved a federal structure in order to cover the 100 local authorities in which it operates. This structure is further discussed in Chapter 2. Within this context LSE Housing and Communities set out to examine:

- How Orbit contributes to the social and economic advance of its communities. What is the added value of Orbit's activities?
- What is the potential for Orbit to do more given the Big Society, community and Localism agendas?
- What would be the key components of a framework for Orbit's role in contributing socially to the communities it serves?
- What are the possible costs and benefits of undertaking further work to develop social and economic initiatives within the framework of the Big Society and Localism?

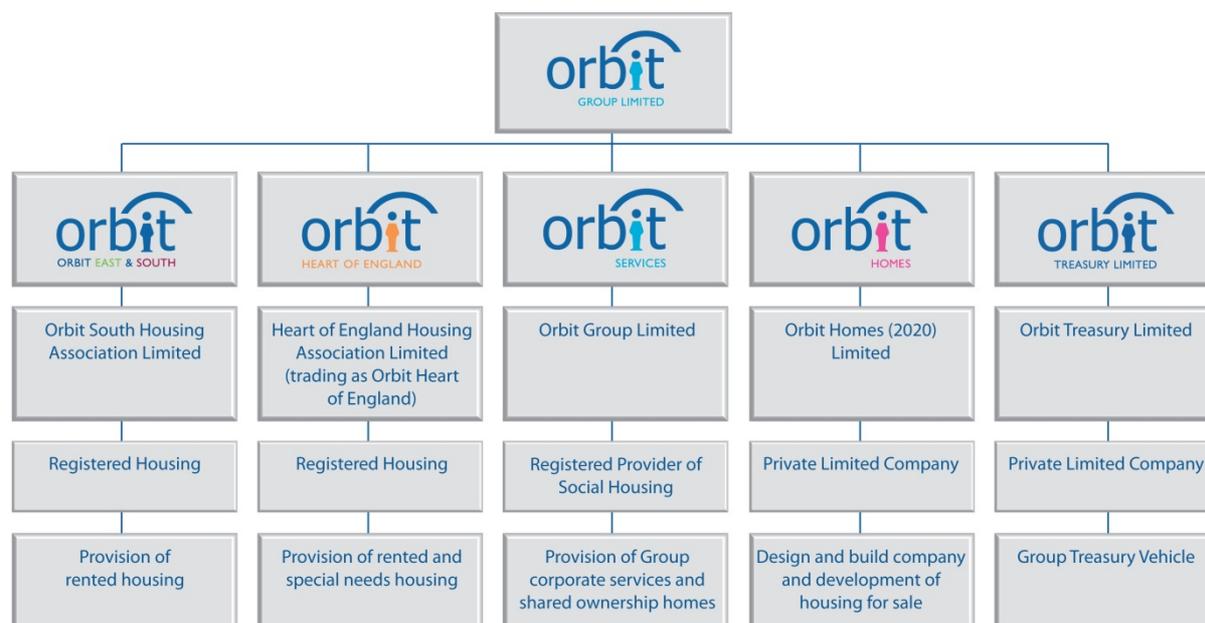
In order to answer these questions we need to:

- Understand the Big Society and Localism agendas and what they imply for Orbit in providing affordable homes and related services across the Midlands, East and South East of England; also what they imply for Orbit's partners and the communities it works in.
- Attach a social value to Orbit's current commitments to communities and voluntary activities; and assess the level of support needed for social and economic projects to be successful.
- Develop a framework for delivering community projects in a cost-effective way.
- Explore how Orbit can be a major player in supporting communities within current resource constraints.

About Orbit, its structure and challenges

Established in 1966 and registered with the Housing Corporation in 1975, Orbit Group has grown to be one of the largest housing groups in the country, providing 37,000 properties to 70,000 people in 120 local authorities across the Midlands, the South East and the East of England. The current group structure is outlined below (Figure 1). The governance of Orbit Group has also adjusted to reflect the new structure of the Group, with the boards of subsidiaries taking on a more significant role.

Figure 1: Orbit Governance Structure

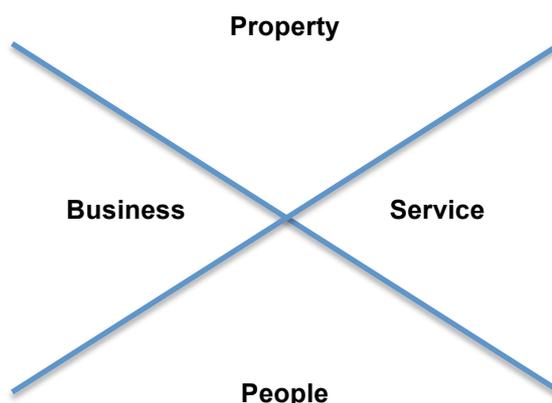


Orbit Group operates from 23 offices divided into three regional arms. Overall it owns and manages 37,000 homes located across 125 local authority areas. It owns 26,800 general needs rented homes, 3,300 supported housing and 2,900 low-cost home-ownership properties. In addition it manages 2,100 leasehold and 1,100 private retirement homes.

Orbit's annual turnover is £165m, with some 1,200 employees. Orbit is also the UK's largest HomeBuy agent, assisting first-time buyers. It runs six Care and Repair/Home Improvement Agencies, a 24/7 Customer Care Service and other initiatives such as the 'Orbit Academy', which provides learning tools for staff, residents and board members. Orbit South, East and Heart of England each have a social and community investment programme, tackling local needs and problems in local ways. This investment is the main focus of the report. For information on Orbit's current investment strategy see **appendix 1**.

Challenges facing Orbit - Learning from the wider world

Like all large housing associations, Orbit sees itself as a developer of homes with the ambition to produce more homes to meet genuine need. But it also defines itself as 'a social enterprise **with emphasis on the social**', because of the communities Orbit works in, its neighbourhood roots and its continued presence in low-income areas. There are huge risks involved in focusing only on the more commercial side of housing given that Orbit already has a stock of nearly 40,000 rented properties, housing mainly low-income people. Figure 2 sums up Orbit's approach: the cross-over between property and people, and between business and service.

Figure 2: Tension of commercial and social policy focus for social landlords

The **first and biggest challenge** facing Orbit and other large associations is how to reconcile a strong resident service focus while creating greater efficiency and streamlining management operations, to reduce costs and retain viability in the face of widespread cuts in external local services.

A second challenge is to close the gap between the low incomes and low costs of social rented homes and the imperatives of welfare reform: reductions in housing benefit; changes in rent payment arrangements; penalties for under-occupation while housing an ageing population; reduction in grants for new build; continuing need for more homes. More widely the social problems we face as a society pose special challenges to housing associations as landlords primarily to needy households.

A third and eventually more fundamental challenge is the rising cost of energy and other commodities (including food and building materials). Energy prices impact most seriously on transport, petrol prices and the future costs of sustaining frontline contact with communities housed in a dispersed stock. This hits low-income tenants hard, not only in fuel bills, but in rents and other basic costs. These costs are **not** directly linked to the cost of social provision. Increasingly however they will be drivers of a continued loss of Orbit's social contact and face-to-face problem solving. These are the very priorities to which both staff and tenants attach the highest priority.

A fourth challenge, linked clearly to the third, is the dispersed nature of Orbit's new build and existing stock, how it is managed and how Orbit's social mission, to house low-income tenants, fits with and can be reconciled with its social mission of creating, sustaining and contributing to viable working local communities.

Orbit has set itself an overarching challenge: developing a forward-looking strategy, with 2020 as the end date. To inform this work, Orbit commissioned five think pieces¹ to examine key aspect of the socio-economic and political landscape which were felt to have a significant bearing on Orbit's business, namely:

¹ Graham, Simon (ed.) (2012) *Housing 2020 – Six views of the futures for housing associations*. Coventry: Orbit Group

- The wider economy;
- Poverty, welfare and work;
- The political environment and localism;
- Consumers, choice and competition;
- Environmental and energy issues.

Overview

Within the context of this forward vision – not yet proposed – Orbit asked LSE Housing and Communities to develop a framework for social investment, based on what we learnt from residents and frontline staff, from Orbit's community investment projects, and from ideas gleaned from other sources. We also assessed how Orbit can maximise the social value of its investments to its tenants, to the wider community in which it operates, and to the housing world.

The wider aim is to generate sufficient momentum from evidence and ideas to win public recognition of social landlords as vital contributors to the stability, progress and well-being of disadvantaged communities, through their role as social innovators, entrepreneurs and organisers. There is a danger in the current climate that the social non-profit purpose for which housing associations were created could be under threat. Housing associations are expected to prove that they are 'commercially viable', meet 'market needs' and develop financially self-sustaining activities to support their social mission. This frontline research presents evidence that housing associations as social enterprises must balance carefully their social, entrepreneurial and business imperatives, in order to retain their core purpose.

Chapter Two: Methods of research

To answer many of our questions we had to become familiar with local context, networks, local relationships and community dynamics. In designing our methodology it was clear that a simple survey would not provide the rich detail we needed. We wanted residents, staff and community leaders to be creative and thoughtful in their comments and answers. We consequently placed **qualitative semi-structured in-depth interviews** at the core of our methodology to answer strategic questions, but also to allow for unexpected ideas and suggestions. We wanted to visit residents in their homes and allow them to speak freely about their views and experiences of being Orbit residents.

Within the 100 local authority areas in which Orbit operates there is a wide range of stock with varying levels of concentrations. We aimed to reflect this diversity in our selection of three case study areas. Large urban, town and rural areas were identified with Orbit staff members and we finalised **Becton Place** in the densely populated London Borough of Bexley, **Brownsover and Cawston** in the Warwickshire market town of Rugby, and several schemes across urban and rural **Suffolk and Norfolk** as our target areas. Each case study area is introduced in **detail in Part 2 of Volume III**.

Our local qualitative research in these three distinct areas ultimately involved over 170 in-depth interviews conducted with Orbit residents, staff and area community leaders. These interviews were conducted by LSE research staff, and also by specially trained Orbit resident peer researchers – a relatively new and untested method, which is further elaborated on in Chapter 3.

In order to check the validity of our qualitative findings we compared the final sample of residents interviewed with the overall profile of the Orbit tenants in the three case study areas. This analysis confirmed that the sample aligns statistically with the characteristics of the population under study and is therefore representative. For further information on the interview sample see **Part 1 of Volume III**. The validity of our evidence is also confirmed by the consistent pattern of responses across the three very different case study areas.

We used a combination of open and closed questions, which made some questions easy to tabulate and provide statistics on our sample. While we expected local contexts to show differences, we were interested to see whether our analysis would show that residents are alike in their general response to community services, needs and development. We chose three contrasting areas where Orbit works (South, East and Heart of England), with contrasting population density and stock (urban, town, rural) to interview residents and staff. We asked questions around the following themes:

- What the area is like and what residents find good and bad about their neighbourhood;
- What services residents use and what gaps in provision exist;
- Residents' perceived relationship with Orbit;
- Residents' feelings on community and how they think it could best be developed;
- What Orbit residents need to make their lives and communities work better;

- Whether and how Orbit tenants can contribute more directly to their community;
- What community initiatives, undertaken by Orbit directly or in partnership with other organisations, work best and offer the greatest social return on investment;
- What other models / beacons of community investment can Orbit learn from and draw on, building on its own strengths?

The answers to these questions were hoped to inform larger, more strategic questions, including:

- How do the social and entrepreneurial approaches combine, and how does social investment fit within the business environment in which Orbit is planning its future development?
- What funding sources are out there?
- How can Orbit weigh up the full economic costs of social investment against the often intangible benefits of social and community initiatives?

Our in-depth interviews, which lasted two months, followed on from two months of meetings and visits to a wide spectrum of Orbit's developments, offices, projects and partners. This provided a local knowledge foundation from which the LSE research team could develop a framework for social investment. Part 1 of Volume III sets out a detailed account of our methodology and analysis stages. The 25 steps of our research process are outlined in Figure 3.

Figure 3: Steps in the Bigger than Business research process

1. Understand Orbit's structure and inter-group relations; also stock distribution, type, age concentration and communities.
2. Identify case study areas in three regions and collect base-line information. Decide how to cover dispersed, semi-rural stock in East.
3. Initial interviews with Orbit staff to further understand and contextualise the organisation.
4. Develop questionnaire to interview residents in three case study areas about their communities and social programmes – pilot questionnaire and revise it.
5. Develop proposals for peer research including drafting ads, job descriptions, personal requirements, training programme. Work out screening method.
6. Develop and pilot peer researchers' questionnaire. Confirm peer recruits.
7. Select peer researchers by vetting hand written applications and checks.
8. Take six peer researchers to Trafford Hall for thirty-hour residential training and support them in fulfilling seven task-based exercises – identify their availability for interviews.
9. Identify and arrange interviews with key staff at different levels of three regions.
10. Identify tenants to interview in three areas and contact them to arrange in-depth interviews – carry out 10-15 interviews per area.
11. Arrange peer interviews with 20-30 tenants per area.
12. Hold support and brainstorming sessions with peer researchers in two areas.
13. Hold regular team research meetings with Orbit staff to report progress and advance our analysis and framework for action.
14. Contact community projects in three regions, visit and assess their viability and impact.
15. Identify community leaders in each area and interview them.
16. Identify ingredients of successful projects.
17. Investigate all possible sources of finance, including new financing models such as social impact bonds and social return on investment models.
18. Analyse interview findings from 120 residents, 32 staff, 18 community leaders and draw out findings.
19. Hold peer research workshop at LSE to develop the model with their input.
20. Get peer researchers' assessment of the costs and benefits of their voluntary inputs into the research. Develop a full cost-benefit analysis of the peer research model.
21. Develop possible scenarios for Orbit's future social investment, based on our findings.
22. Develop an overarching framework for approaching social investment within the Orbit Group; and on applied framework for developing projects on the ground that fits under the four pillars of our overarching framework.
23. Test whether ingredients for successful projects (and practical steps) fit within the applied and overarching framework.
24. Write up full findings. Explain development of framework, scenarios, peer research etc.
25. Develop a list of priority actions and recommendations.

Chapter Three: The role and significance of peer research

Why we used tenants as volunteers to help us carry out our research

I really do miss doing the interviews! (Laughs) It was lovely to be part of something. (Peer Researcher, Rugby)

For the Orbit Big Society study we piloted the relatively untested peer research method of gathering information and ideas from tenants through tenants of the same landlord. Specially selected tenants would be trained in interview methods and become volunteer interviewers, in order to gather information from fellow residents, neighbours and friends in their own communities, to feedback to the LSE research team. This method of data collection was developed for the following reasons:

- The current focus on volunteering and the possible contribution to local communities;
- Orbit's commitment to cost-effective projects that help it support communities, while maximising the value of its limited resources;
- Orbit's ambition to work with communities directly in training and up-skilling tenants. This ultimately increases tenants' confidence and expands work-related experience.

The peer research method has the potential to bring Orbit's landlord operations closer to the communities it works with. The following section describes the process in brief, presents the results and analyses the costs and benefits of the method. For a full report on the experience see **Part 3 of Volume III**.

Identifying and training peer researchers

Trafford Hall made the training for us. It's a relaxed atmosphere. We were all so sceptical on the way up there... That's where the training helped us, it made us feel confident. (Peer Researcher, Rugby)

The training was really good. I was nervous about going into people's houses and asking questions. If I hadn't had the training I could not have done it. (Peer Researcher, Becton Place)

We decided to limit the peer research pilot to areas of high population density and thus excluded Orbit's Eastern stock, due to its dispersed rural characteristics and large geographical span, making travel difficult. With the two target areas of Bexley and Rugby, we began our outreach attempts through delivering flyers door-to-door and asking staff members to encourage interested residents to apply. It was quite a **struggle to identify and recruit willing tenants** and the process showed that it is hard to recruit tenants to do things that are potentially useful and attractive, but that involve several unknown elements, and that require a considerable commitment of time and effort. Tenant responses were forthcoming when staff drew on their existing relationships with tenants and were able to introduce and explain the project and its benefits to residents individually. This is an important lesson from the pilot.

Having identified our six willing residents, we invited them to our peer researcher training held at the National Communities Resource Centre at Trafford Hall in Chester. An experienced trainer facilitated

the session and an LSE researcher was on hand to help. **The importance of a concentrated training experience in delivering this project is hard to overstate.** In just thirty hours, tenants with little comparable experience to draw on were able to complete seven distinct tasks, be assessed, carry out pilot interviews, receive feedback, master the essentials for the project, receive a certificate of completion and gain real skills. Informal times were also built into the training schedule during which peer researchers and staff could develop a rapport. Building relationships between peer researchers and staff proved invaluable to the success of the project, in terms of communication, reliability, and most of all enjoyment. The peer researchers were encouraged to view themselves as part of the research team. The open structure of the group discussions allowed residents to raise questions and concerns with staff, and the residents provided invaluable feedback on the questionnaire and on details of the project itself. The key lessons learned from the training process are listed in Figure 4.

Figure 4: Lessons learned from peer research training

- Tenants need **significant ‘hand-holding’** and encouragement in facing new challenges, like most people. But what might seem easy to those used to being more connected – e.g. travelling long distances to attend residential training, visiting strangers and asking lots of detailed questions – can be very daunting, and people need support and encouragement.
- **Training has a strong appeal** and was part of the motivation for getting involved. Training adds significant capacity to people’s innate talents.
- **Residential training** (of only 30 hours) gave people the chance to go into detail, digest ideas, correct mistakes, learn to team-play, as well as gain multiple skills in a peaceful setting that maximised their concentration and enjoyment.
- Completing **task-oriented training sessions** gives people a strong sense of purpose and achievement. Participants knew they had to complete the tasks in order to ‘qualify’ for the job. They were very anxious to gain certificates.
- Tenants feel a real sense of **pride and achievement** in going away together to learn new things.
- There was a **clear purpose** to the training and the work – ‘make Orbit better’ and ‘make their community better’. This gives shape to people’s commitment and is a big motivator.
- **Recognition, a certificate and feedback** are strong, positive reinforcements of the training experience.

Interviews

*Going into people’s homes was very interesting; it corrected my views on some areas.
(Peer Researcher, Rugby)*

It changed my views on some people; all the mothers I visited were working and studying. I didn’t meet anyone on benefits doing nothing. For me that was a good experience. (Peer Researcher, Rugby)

A timeline was organised which set 30-40 peer researcher interviews as the target for each area within a month after the Trafford Hall training. Peer researchers were asked to conduct between two-to-four interviews per week. The LSE team set up interviews, and most scheduled interviews were

successful and lasted anywhere between 45 minutes and an hour and a half. However, the number of no-shows – residents agreeing to be interviewed, but not answering their door at the stated time – was significant, around one in four failing to respond. This was disheartening for the peer researchers and LSE staff, and it was important to respond to the peer researchers' frustration both on the phone and during the **fortnightly brainstorming sessions** held in both areas to allow the peer researchers to share experiences. However, all in all there were no negative encounters with interviewees based on the peer researchers' feedback.

Outcomes and benefits

Working with the LSE has helped me on a personal level. The training for becoming a peer researcher helped me to cope with dealing with people which I had found difficult. (Peer Researcher, Becton Place)

There were no costs to me of taking part in the peer research experience, just lots of benefits! (Peer Researcher, Rugby)

Out of 120 resident interviews, 61 were conducted by peer researchers. There were definite savings to LSE staff in terms of time that would have been otherwise dedicated to travelling and interviewing. On several occasions, peer researchers were able to gain access where LSE research staff would not have been able. For example, one peer researcher managed to gain access to a supported housing scheme otherwise closed to LSE staff. In general, several peer researchers thought that their position as a fellow resident made interviewees open up more.

Following the final workshop, the peer researchers were asked to identify what they felt the costs and benefits of their contribution to the project were to them personally. The group responded to our prompt about costs by insisting that there had been **no costs to them**, but on further questioning produced a small list of costs which included mobile phone calls, travel and some frustration over cancelled resident interviews. The list of benefits to them as a result of their involvement in the project was much longer and included the following:

- The project provided a **platform for learning about people** and areas in the community;
- The collaborative approach to the project made them **feel ownership** over the research;
- All were pleased with the **training** they received and felt Trafford Hall had been essential;
- All claim that this has been a **positive experience for the interviewees**, giving them an opportunity to get issues off their chest, feedback and be listened to;
- All said they contributed because they **want to improve their area**;
- All said they **would do something like this again**;
- All said that it had been a **fun and enjoyable process**;
- All felt they had developed a **friendship group**.

In order to further assess the value of the peer research experience, we developed a basic costs and benefits analysis of what we did. This analysis shows that the real cash costs are outweighed by the identifiable cash benefits of training residents to inform and provide services on behalf of Orbit. We

outline our calculations in Figure 5. This calculation applies to our research, but it could also be used to work out the monetary value to Orbit of developing “peer training” for resident involvement in other areas.

Figure 5: Costs and benefits of peer reviewing

Activity Requiring Cost Input	Amount £
<ul style="list-style-type: none"> • Salary cost for Orbit in staff time, assuming middle rank Orbit officers managing leaflet distributions in two areas over two days; 	400
<ul style="list-style-type: none"> • Cost of producing leaflets; 	200
<ul style="list-style-type: none"> • Training and accommodation costs at Trafford Hall at £80/day including the use of facilities, equipment, food (three meals), tea, coffee and support staff; 	1,800
<ul style="list-style-type: none"> • Direct expenses for travel and out-of-pocket expenses; 	1,120
<ul style="list-style-type: none"> • Research team costs in time, including all interview scheduling, organising and running peer sessions, attending training, being available on mobile at all times; 	3,750
<ul style="list-style-type: none"> • Use of facilities, excluding training (may not be charged, for example at the LSE or Orbit local offices). 	0
Total estimated cash cost:	£7,270

Activity Producing Benefits and Savings	Amount £
<ul style="list-style-type: none"> • Savings on research contract, including estimated time saving, assuming researchers carried out interviews more quickly over 25 days including travel. 	7,750
<ul style="list-style-type: none"> • Peer researchers’ time (unpaid) assuming twenty hours interviewing time plus thirty hours training, attending meetings, valued at £10/hour, i.e. 50 hours . 	3,000
<ul style="list-style-type: none"> • Better knowledge and understanding of tenants, both volunteers and interviewees, leading to more productive relations and more voluntary input in future. Unquantifiable benefits to Orbit in learning and reputation. 	Unquantifiable
<ul style="list-style-type: none"> • Significant learning experience particularly on the importance of training and the value of “hand-holding” support – a “pay-to-save” approach. Orbit needs dedicated, skilled, persistent and entrepreneurial staff for this approach to work. 	Unquantifiable
<ul style="list-style-type: none"> • Immeasurable benefits to the tenants involved and the wider community. The benefits to the peer researchers were so significant that all involved argued they had incurred no costs. 	Unquantifiable
<ul style="list-style-type: none"> • Greater value of residential training with potential application to other Orbit work. At relatively modest cost Orbit could help many more residents take advantage of subsidised training. 	Unquantifiable
Total estimated cash savings:	£10,750

Some of the gains are of course impossible to measure precisely as they relate to personal development and indirect benefits, for example to Trafford Hall, the research team, the trainers throughout the learning process and the future benefits this will yield. In trialling and learning from this method a new opportunity has opened up. Figure 6 lists several unquantifiable benefits of the peer

research experience. Figure 7 sets out the steps that the LSE team followed in developing and carrying out the peer research method.

Figure 6: Step-by-step guide to the peer research method

- 1) **Establishing aims and context:** Secure buy-in of whole management team and their acceptance of external support role. Agree case study areas to target and clarify research. Agree training requirement and approach.
Duration: one month
- 2) **Developing the basics:** Draft peer research recruitment advert, agree basic requirements for task, develop job description and personal qualities, agree screening process.
Duration: one month, overlapping with previous step
- 3) **Thinking through the process:** Develop and pilot residents' questionnaire. Devise information sheets, simplify format, instructions, and questions.
Duration: two weeks overlapping with previous step
- 4) **Spreading the word and identifying volunteers:** Develop leaflets, post electronically, drop flyers in areas, spread by word of mouth, use personal contacts to secure applicants and confirm recruitment.
Duration: one month overlapping with previous steps
- 5) **Training:** Organise training with venue (Trafford Hall), trainer (Urban Forum and Trafford Hall), content (LSE research team), tasks and assessment (LSE with trainers), completion certificates (Trafford Hall with LSE), agree how to carry out tasks with help from Trafford Hall staff. Devise task sheets, prepare materials for all tasks including interviewing.
Duration: two months starting at beginning and spread throughout the process
- 6) **Hand-holding:** 'Hand-holding' residents on journeys, overnight stays and task orientation to completion of training and interview period.
Duration: starting before training and continuing through out project
- 7) **Organisation:** Prepare research packets for each peer researcher as a positive reinforcement of their role, including official ID, stationery, validating letter, pens and clipboard etc. Secure availability of volunteers for interviewing and fix interview schedule.
Duration: two days
- 8) **Feedback:** Convene peer research 'brain-storm' sessions every two weeks to collect their direct feedback on interviewing.
Duration: two hours every two weeks for six weeks
- 9) **Analysis:** Collect completed questionnaires, input and analyse findings. Quality control information.
Duration: on going
- 10) **Contact and Support:** Keep constant contact through telephone and texting etc. to pick up on problems, offer advice and support. Keep up flow of interview appointments (all booked through LSE team)
Duration: on going
- 11) **Round up workshop and celebration:** Organise round-up workshop at LSE to identify costs and benefits and celebrate achievements.
Duration: one day

Figure 7: Unquantifiable benefits of peer reviewing

- Increased confidence of peer researchers
- Increased local knowledge and understanding of local needs
- Improved Orbit reputation and recognition among residents and other organisations
- Improved skills and training of peer researchers
- Future pool of residents for Orbit to activate and draw on
- Improved relations between Orbit staff and tenants
- Reaching residents through interviews that Orbit staff may be unable to contact
- Assessing stock conditions
- Identifying useful partnerships, or successful service models
- Increasing frontline presence

Conclusions

I would like to do something similar to this again. I liked the way we were treated as valued colleagues by the LSE team. (Peer Researcher, Rugby)

The peer research method demonstrates the levels of commitment that is needed in order to win residents' active participation. However, **the likely saving and measureable benefits to the organisation balance and justify this commitment.** The peer researchers unanimously and enthusiastically responded that it had been a positive experience that they would be eager to replicate. The outcomes for the project – over sixty resident interviews and the active participation and feedback from six Orbit residents – provided invaluable information, cost and time savings.

We believe, based on this experience, that Orbit can deliver several community-level services using this approach. In particular, it can generate strong resident engagement around its strategic priorities. We believe it could apply particularly well to energy savings, financial advice, elderly care and family support. However, as we have demonstrated, it requires considerable commitment, skill, persistence and experience to facilitate this approach.

Part 2: Findings from the ground – the views of residents, staff and community leaders

Chapter Four: Resident interviews and bright ideas

Overview

This chapter presents the core of our qualitative fieldwork – the in-depth interviews conducted with Orbit residents. Over two months the LSE research team alongside Orbit's peer researchers held over 120 resident interviews in the three case study areas. Interviews ranged in length from thirty minutes to an hour and a half. The questionnaire can be found in **appendix 3** and broadly covered questions on residents' perception and assessment of their housing and local area; thoughts on community and community activity; their relationships with Orbit; concerns regarding welfare reforms and cuts to local services; gaps in social provision; services they would like to see introduced or developed in their community; and what role Orbit should play in the community. We adopted a semi-structured approach to the questionnaire, which allowed residents to talk freely about their ideas and concerns and to emphasise issues of particular importance to them. While the case study areas differed in their responses, six key resident themes and several priorities emerged as general outcomes.

Resident themes:

- Three in five Orbit residents think their **housing is good or excellent**;
- Three in five Orbit residents feel that their **neighbourhood is satisfactory**;
- Half of residents say there is **no community spirit** in their area and two thirds say that **they do not attend community events**;
- In discussion residents acknowledge that **issues with repairs** stop them from trusting Orbit as a viable provider of other services;
- **Poor communication** and contact with Orbit staff is most often cited as the main issue between residents and the organisation;
- Just under half feel their area is **bad for the elderly**, while three in five say the area is **good for families**.

Resident priorities:

- The three priorities that span the case study areas are:
 - Crime;
 - More facilities for children of all ages;
 - Helping people into employment.
- Residents would like to see more of the following community services provided (in rank order):
 - Tackling anti-social behaviour;
 - Youth clubs;
 - Help to reduce fuel costs;

- Job clubs;
 - Crime watch;
 - Community barbeques;
 - Adult education.
- Residents would like Orbit to provide more services relating to training, education and employment opportunities. Residents want Orbit to provide the following top five services:
 - Help young people gain qualifications;
 - Organise community events;
 - Local apprenticeship schemes;
 - Support residents into training;
 - Welfare benefits and money advice.
 - Most residents did not know that Orbit provided community services, and almost all residents thought it would be a good thing for Orbit to be more involved in the community.

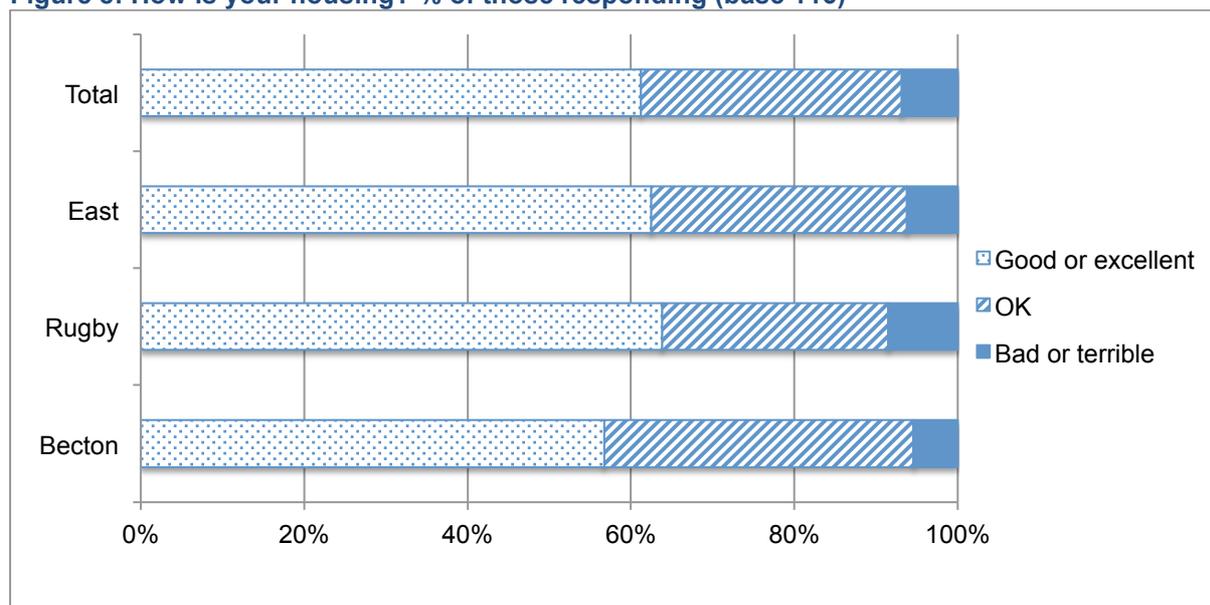
Evidence

The findings presented in this chapter bring across the general points residents made regarding how they would like to see the area improve, what they think is missing from local service provision, how they are struggling, and how Orbit could better respond to their needs. For a detailed analysis including a presentation of our sample, area-by-area and demographic breakdowns, and further specifics, see **Part 4 of Volume III**.

Three in five Orbit residents think their housing is good or excellent

Residents are mostly positive about their homes (Figure 8). Just under 60% think that their housing is good or excellent, while over 90% think it is OK, good, or excellent. Becton residents are least likely to say the housing is excellent (about 8% compared to about 21% in the East and Rugby). Figure 8 shows the outcome. Those less satisfied with their housing cited issues such as the size (six Becton residents), the heating and fuel bills (five in the East), noise (four in Becton) and problems with repairs (nine in Rugby and eight in the East).

Figure 8: How is your housing? % of those responding (base 116)



Three in five residents feel their area is satisfactory, while also believing the area is not improving or staying the same

63% of Orbit residents thought that the area in which they lived was good or excellent (Figure 9). The highest satisfaction was registered in our two case study areas in Rugby, where ten people described their area in very positive terms; however, there was some clear awareness of reputational differences between areas, with five out of the ten Brownsover residents (and one non-resident) commenting on the negative reputation held by Brownsover. The general level of satisfaction with the area is lowest in Becton (55% compared to the average of 63%):

Nothing is really wrong with Brownsover – I’ve lived here over 30 years

It’s good now. Seven or eight years ago there was trouble on the estate...there was even a killing

Brownsver has a bad reputation – glad we chose this area

In the East, eight respondents remarked that their area was pleasant, friendly, and quiet, with only one person commenting on poor public transportation as an area concern, whereas eleven mentioned that shops and other services were local, or within a short walking distance or bus ride.

Residents were also asked about specific aspects of the area. Figure 10 summarises these findings.

Figure 9: How is your local area? % of those replying (base 113)

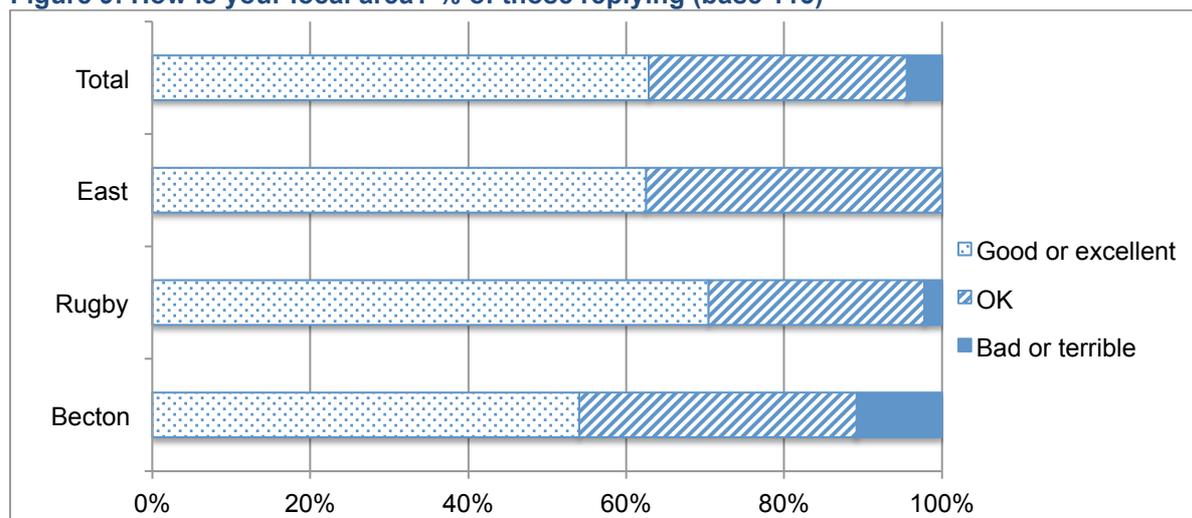
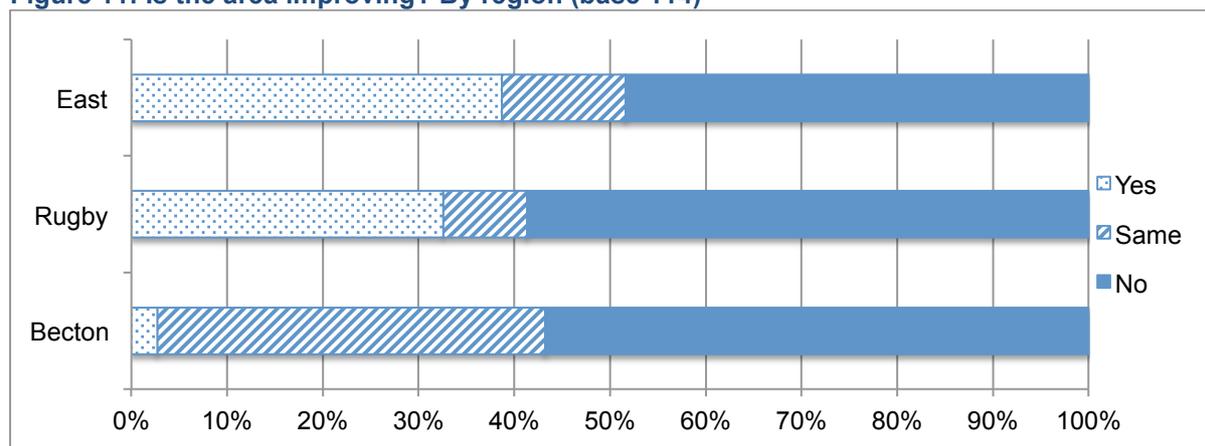


Figure 10: Summary of residents' views of their area

Becton	Heart of England	East
60% neither clean nor dirty	75% clean	68% clean
62% safe	75% safe	62% safe
42% friendly	48% friendly	46% friendly
48% welcoming	62% welcoming	50% welcoming
68% neither dull nor lively	42% lively	75% neither lively nor dull
56% neither noisy nor quiet	65% quiet	65% quiet
48% neither attractive nor unattractive	68% attractive	55% attractive

Questions relating specifically to personal contact with neighbours or other residents were less positively answered, with 56 residents saying their area was not friendly, or neither friendly nor unfriendly; 51 residents stating their area was hostile, or neither hostile nor welcoming; and 69 residents commenting their area was dull, or neither dull nor lively.

Furthermore, residents are not particularly optimistic about whether their area has improved – around 60% in Becton and Rugby say the area has not been improving, and around half of residents in East feel they have witnessed no improvement. On the other hand about a third of Rugby residents and almost two in five of Eastern tenants think the area is getting better (Figure 11).

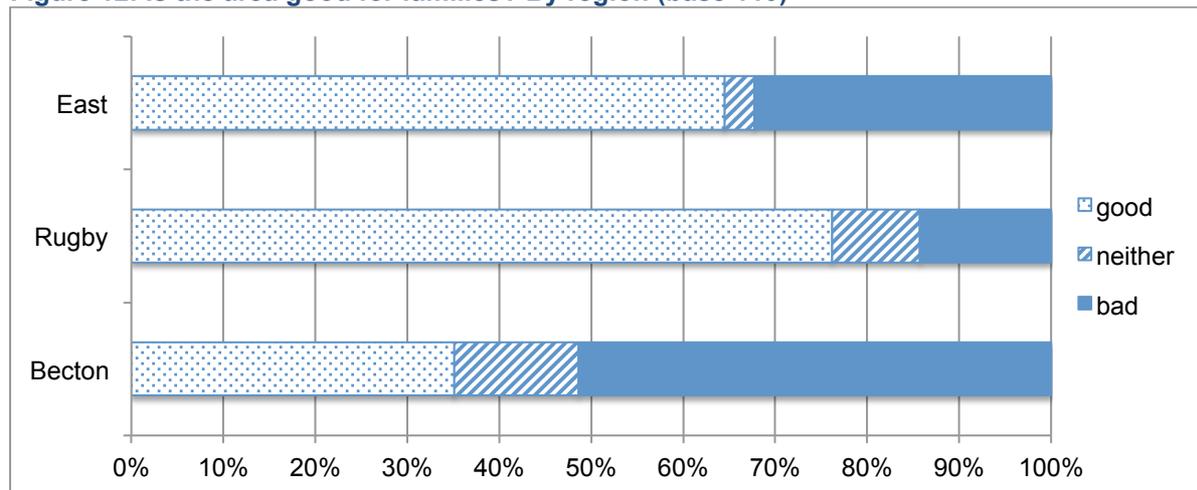
Figure 11: Is the area improving? By region (base 114)

In Becton the main issue given for this attitude, and raised by ten people, was the change of the type of tenants, with an increase in young anti-social tenants who they felt had brought drug problems to the estate. In Cawston all residents interviewed lamented the lack of services and continuous building on the site, except for the current construction of new shops and local services which is seen very positively. In Brownsover residents are evenly split between feeling the area had improved somewhat and those who feel the area stayed the same. Residents who claimed the area had improved were long-term tenants who remembered the drug issues and related violence that had plagued the area ten years ago. It is difficult in the East to derive a consistent view due to the many different schemes visited. However, resident answers are divided between the two extremes with 12 residents stating the area had improved, and 15 residents stating the area had not.

Almost half of residents feel their area is bad for the elderly, while three in five say the area is generally good for families, although this differed by region

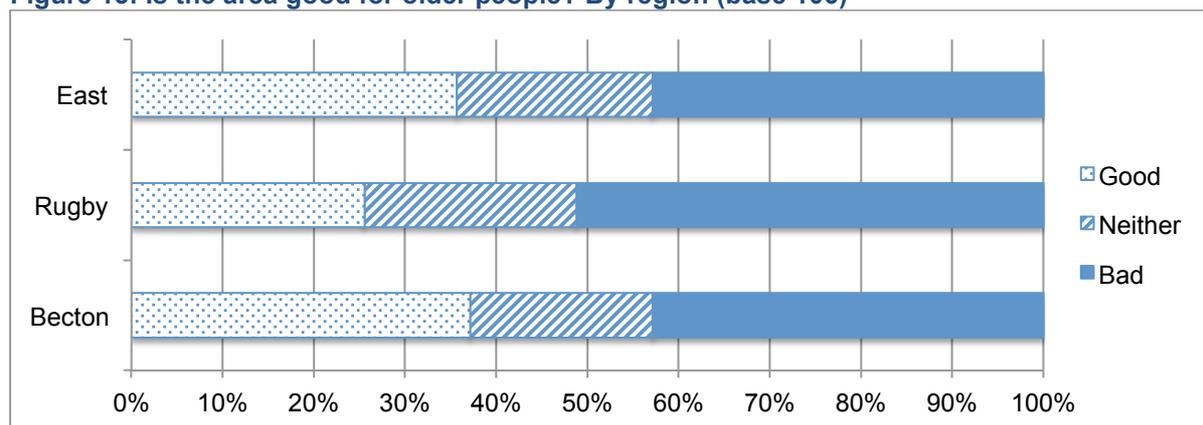
In Rugby almost 80% of people thought their area was good for families, and about two thirds in East, falling to a third in Becton (Figure 12). Residents in Becton were generally more negative about how good the area is for families, with six people noting flats are not good for children, and five that there were insufficient local facilities. In Rugby, ten people noted the good parks and open spaces nearby and sixteen that the area was family-oriented with good local schools. In the East there was also a very positive reaction to this question, with over three in five thinking it was good for families. The East showed some mixed reactions with six residents complaining that there were restrictions on where their children could play, and mentioning transportation and mobility difficulties.

Figure 12: Is the area good for families? By region (base 110)



In both Becton and the East, about two thirds thought the area was either bad or indifferent for older people, whereas over half of Rugby residents thought it was not good for older people (Figure 13).

Figure 13: Is the area good for older people? By region (base 106)



The residents we interviewed recorded strong feelings that the areas were not good for the elderly citing isolation, security, limited services and communities dominated by young families as main reasons.

Not good 'cos it's mainly young families who can be noisy

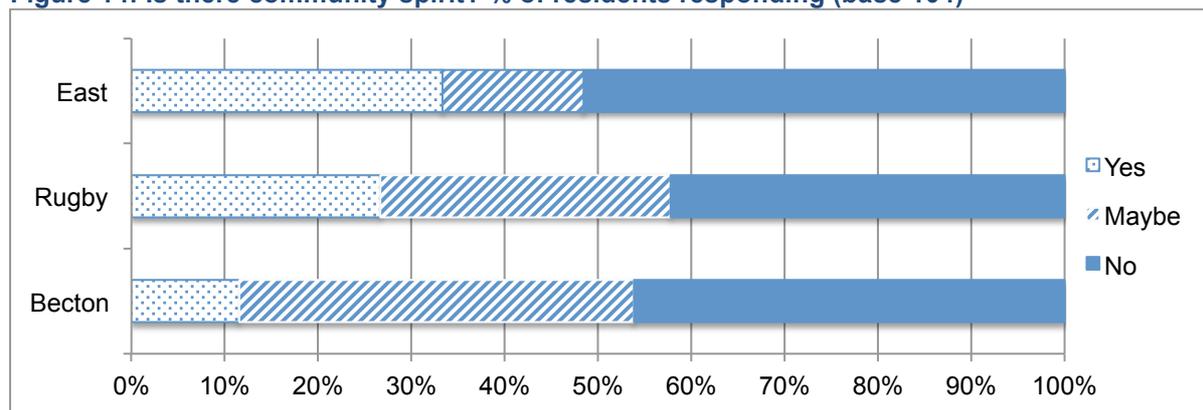
I don't know of any elderly living here, and if they do there's nothing for them to do

I'm not dead yet! The church does a few things but old people today don't want to play bingo. I would like more classes - to learn another language, do Tai Chi or go swimming. It would be nice to keep the generations and likeminded people together – I don't really relate to the young families anymore. What we need is a proper place to meet and to do something exciting

Almost half of residents say there is no community spirit in their area and that they do not attend community events

Community spirit was reported to be rather low in all three areas under study (Figure 14). In Becton two in five residents positively saying that there is none. Similarly in Rugby two in five say there is no community spirit, although about a third say more positively that it exists. Over half of the residents in the East – more than elsewhere – think there is no community spirit, but the East also records the highest level of positive feeling about their local community.

Figure 14: Is there community spirit? % of residents responding (base 104)



Reasons for these replies included eleven people in Becton specifically saying they kept themselves to themselves to avoid some of the more unpleasant tenants. Several reasons were given for low community spirit in Rugby – thirteen people mentioned that the neighbourhood was either divided into cliques, or that people kept themselves to themselves, while ten people mentioned informal or low-level attempts to be friendly or bring people together. In the East twelve people noted that people kept themselves to themselves, partly due to times having changed:

Community spirit? That's gone. We were just talking to the neighbour the other day about that – everyone is too frightened to get involved. We didn't have tellies back then – we just had to talk to each other! I miss that, yes. But people don't stay in the area all their life. Men went to the pub together, children grew up together. People just move too much now

But at the same time nine people noted that they made efforts to generate some social interaction, though at low levels:

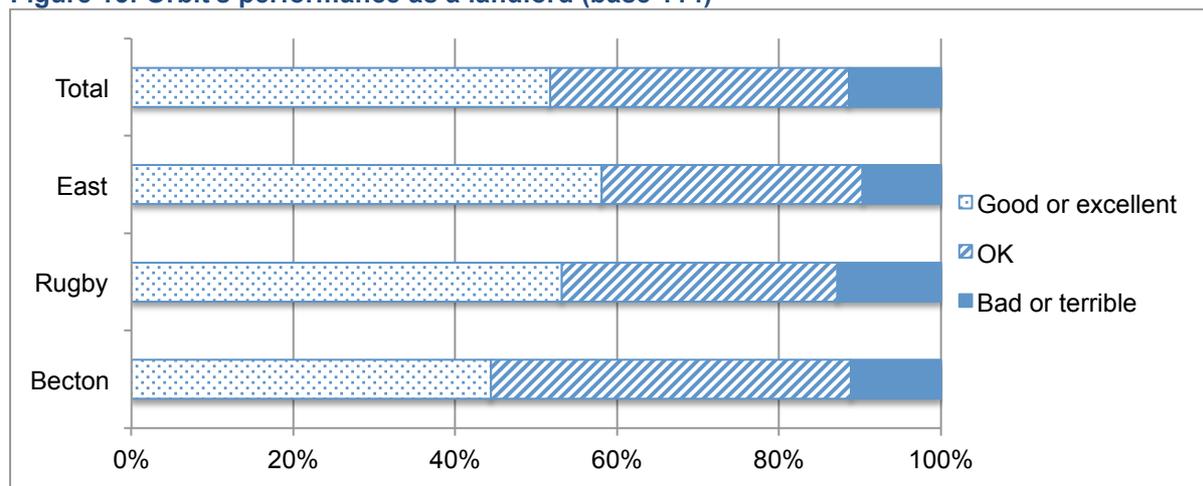
Everyone makes you feel welcome; they are friendly and remember your face to say "hi" in the chip shop

We pursued this issue in relation to community events. There was an overwhelmingly negative response to attendance at local events – in all two thirds (64 out of the 99 people responding to this question) said that they did not go to such events, citing either no knowledge of such events (in 19 cases), being too busy with other things such as family or work (15 cases), or simply not being interested (six cases). Of the 35 people attending events, 21 were primarily either run by schools, churches, or organised around more “tourist” oriented activities (in the East). Overall only nine people mentioned knowing about community events organised by Orbit.

Over half of residents were generally positive about Orbit's service as a landlord, although only two in five residents considered their repairs service good or excellent and a few acknowledge that this failure stops them from trusting Orbit as a viable provider of other services

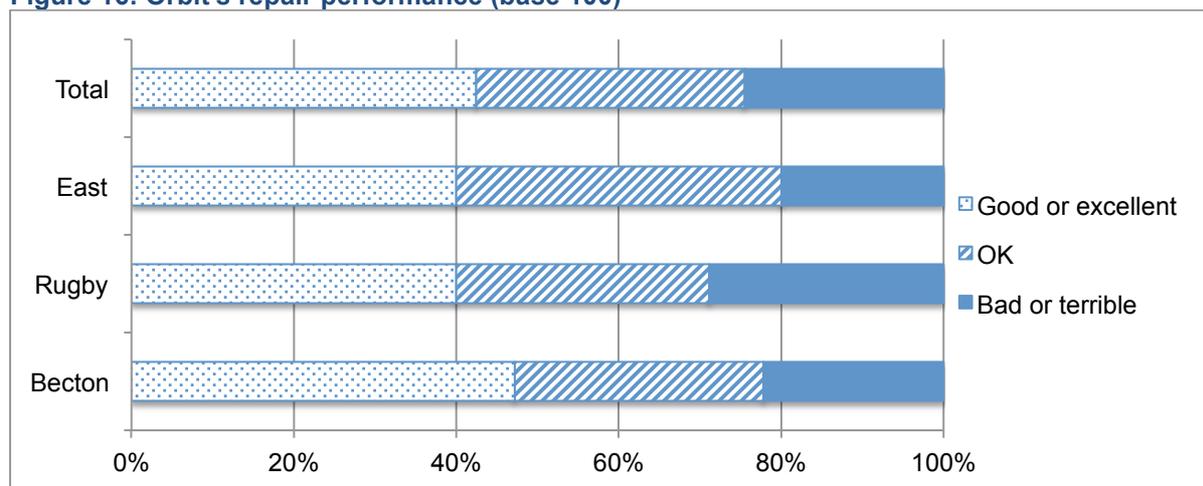
When asked about Orbit's performance as a landlord, the majority of tenants rated Orbit's service as a landlord to be good or excellent; and almost nine out of ten believe it to be OK, good, or excellent (Figure 15).

Figure 15: Orbit's performance as a landlord (base 114)



The picture is not so positive in relation to the repairs service, where only two in five residents think it is excellent or good, while around a quarter think Orbit's performance is terrible or bad – with over 30% in Rugby holding this view (Figure 16).

Figure 16: Orbit's repair performance (base 100)



There were a range of issues about the quality and timeliness of the repairs work and 28 tenants – one in four – complained that repairs were done late and often not finished properly. When asked whether they would like Orbit to be more involved in the community, ten residents said that Orbit

should not, citing the need to stick to its core functions and focusing on maintaining and repairing stock, and communicating with its tenants (four people), expressing concern about how to fund it (two people) or being concerned that the problems were too large for Orbit to tackle, and that people would not be interested (one each):

I want Orbit to focus on what they're supposed to do and what they are lagging on which is keeping the house up to standard

I'd of thought Orbit would want to concentrate on fixing their homes before they worry about community pilot schemes

Poor communication and contact with Orbit staff is most cited issue between residents and the organisation

By far the main issue raised by residents in discussion about Orbit's performance is communication with Orbit's staff. This was spontaneously raised by over 30% of people interviewed (eight in Becton, thirteen in Rugby and thirteen in East). The main problem seemed to be not being able to get hold of someone to talk to about problems:

They provide us with a house but then seem to lose interest – no one tells us what is happening

Hard to get to solve problems or talk to the right person – an email address would be useful

I have to keep phoning about repairs time after time

Problem contacting the housing officer – just get voicemail message and never get to talk

We don't know who our housing officer is

They do seem to be a "caring" landlord but communication is lacking

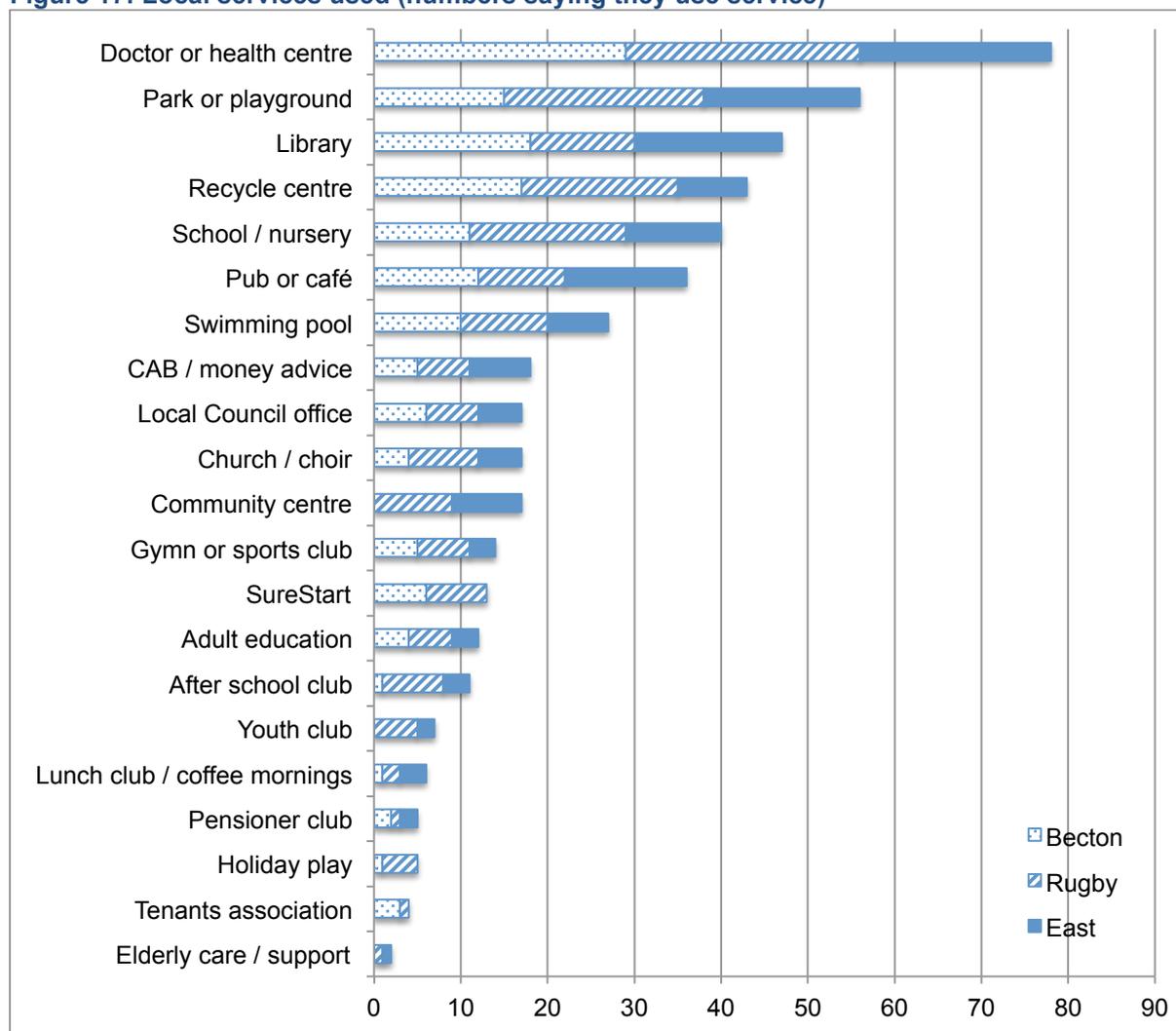
This issue cropped up in many other parts of the interviews. It is clear that tenants do not feel there are adequate means for regular communication and exchange with Orbit. This seems to be a deep source of frustration for many Orbit tenants.

The main services used and key priorities for residents across the case study areas

The main community services used by residents are the doctor or health centre, park and playground, library, recycling centre (by which they most often mean the green bins), school, and pub or café. For the 45-60 age group Citizens Advice / money advice centre figures more highly, and older people use both the council offices and the church (or choir) more often than others (Figure 17).²

² In the tables about services used or wished for, we use the actual numbers of people citing the service rather than a percentage.

Figure 17: Local services used (numbers saying they use service)



We also asked about wider priorities for the area and for the local authority. Figure 18 summarises people’s views in response to a list of options about what might be priorities in the area. This shows that crime is seen as the major priority, followed by facilities for children of all ages, then help to get people into jobs. The top five issues identified by region are set out in Figure 19. Crime, clubs and things for youth are priorities for each area; and helping people into jobs, play spaces for smaller kids, and services for older people for two areas.

Figure 18: Main priority issues for the area (numbers identifying issue)

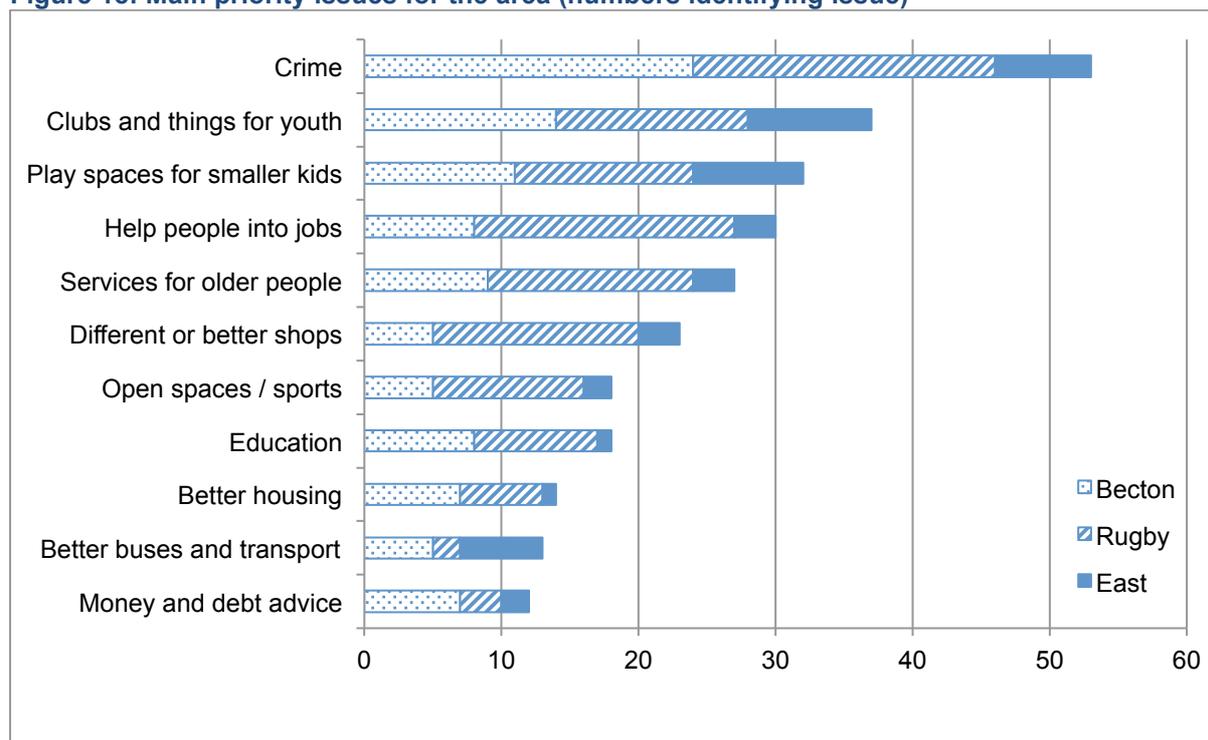


Figure 19: Highest priorities for the area

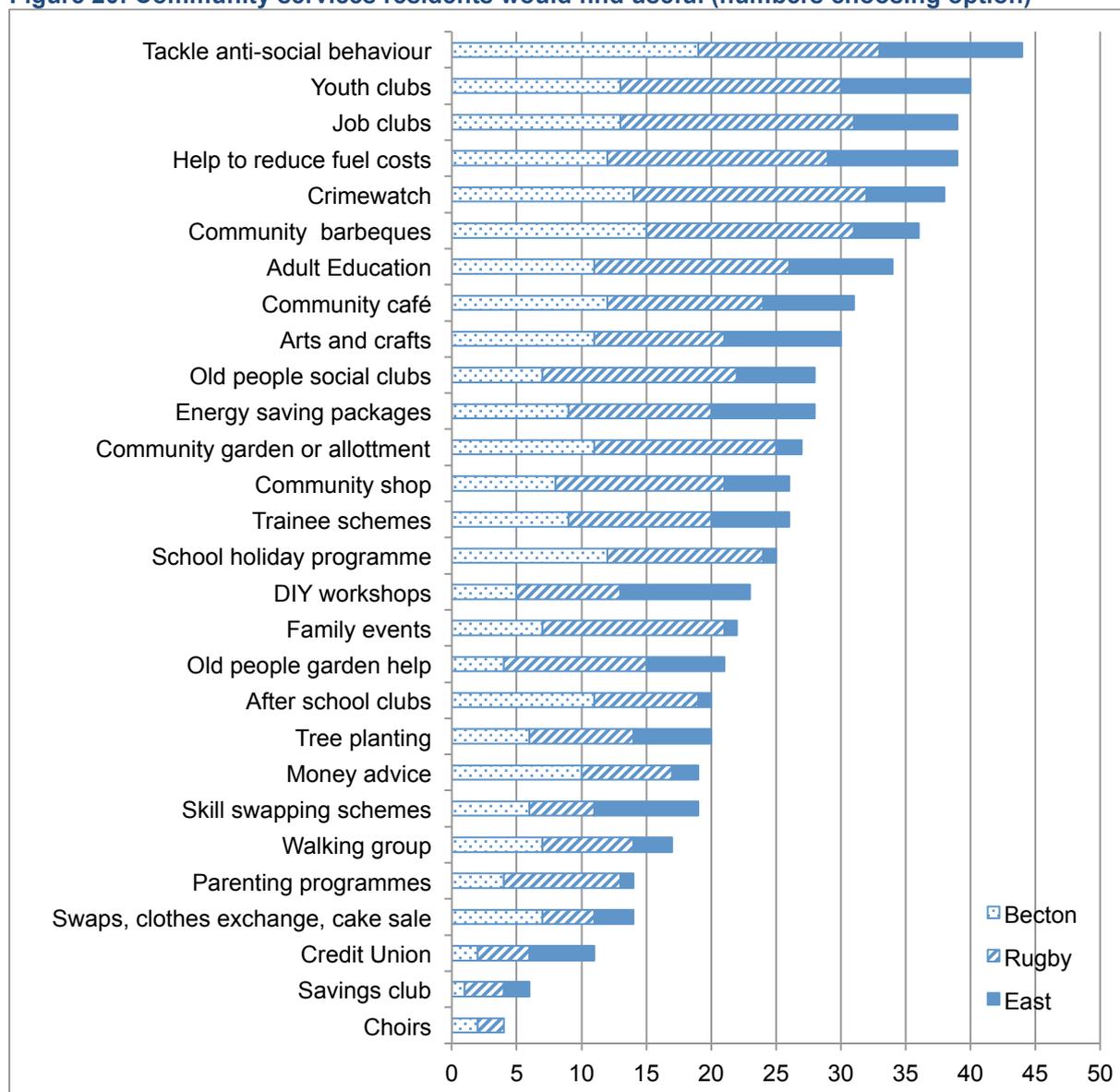
Most frequent	Becton	Heart of England	East
1	Crime	Crime	Clubs and things for youth
2	Clubs and things for youth	Help people into jobs	Play spaces for smaller kids
3	Play spaces for smaller kids	Services for older people	Crime
4	Services for older people	Different or better shops	Better buses and transport
5	Education	Clubs and things for youth	Help people into jobs

Residents were also asked if they had seen recent changes to services, with the aim of finding out whether they had been affected by local authority cuts. Half (53%) had not yet noted any reductions or cuts in services. Of those who had, six were in libraries, three in leisure centres, two each in childcare provision, welfare advice, and street lighting, and one in a lunch club. Three people did additionally flag that they expected cuts to occur shortly.

Community services residents would like to see provided more in their area

We followed this line of questioning by asking residents what services they felt they were missing and would like to see provided in their communities. The community services they would like to have available in rank order included schemes to tackle anti-social behaviour, youth clubs, help with fuel costs, job clubs, crime watch, community barbeques, and adult education (Figure 20).

Figure 20: Community services residents would find useful (numbers choosing option)



By consolidating responses overall, by region and by age demographic, we can identify the most useful community services according to residents interviews as tackling anti-social behaviour (ASB), job clubs, youth clubs, help with fuel costs, crime watch, and community barbeques.

Residents would like Orbit to provide more community services relating to training, community events, education, employment opportunities, and money advice

Residents would like Orbit to provide more community services with a clear emphasis on training, education and increased employment opportunities, as well as on “soft”, fun community-oriented projects (Figure 21). Residents specifically mentioned help for young people to gain qualifications, local apprentice schemes, organising community events, welfare benefits and money advice, supporting residents into training, local gardening and green spaces, and women’s health services. A breakdown by area shows a similar focus on training, education and job opportunities, as well as an

interest in softer involvement such as through local gardening and organising community events (Figure 22, Figure 23, Figure 24).

Figure 21: What would you like to see Orbit do in your area? (numbers choosing the option)

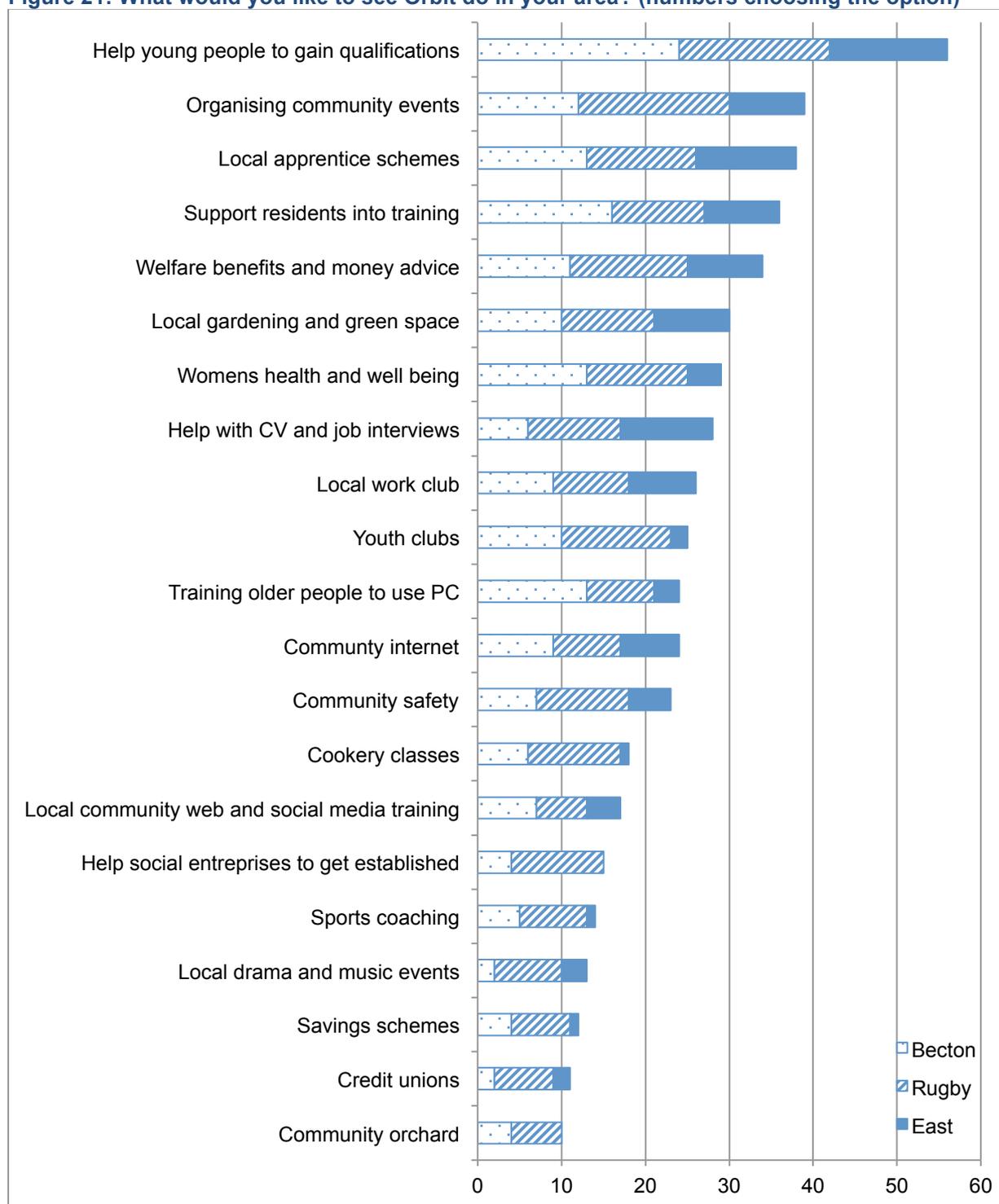


Figure 22: Becton – top five Orbit activities (number mentioning)

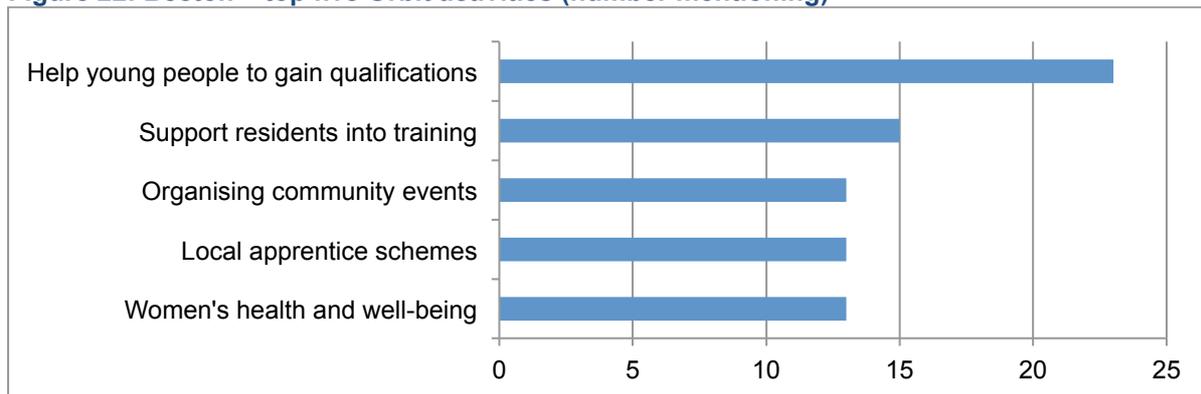


Figure 23: Rugby – top five Orbit activities (number mentioning)

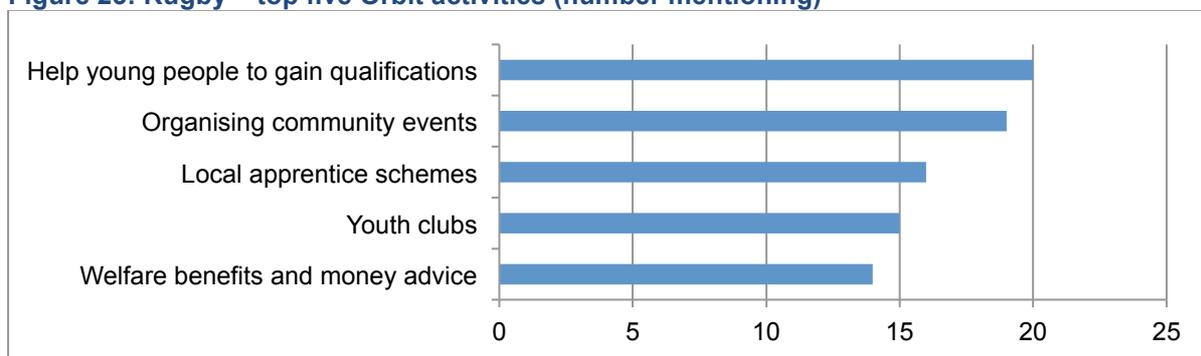
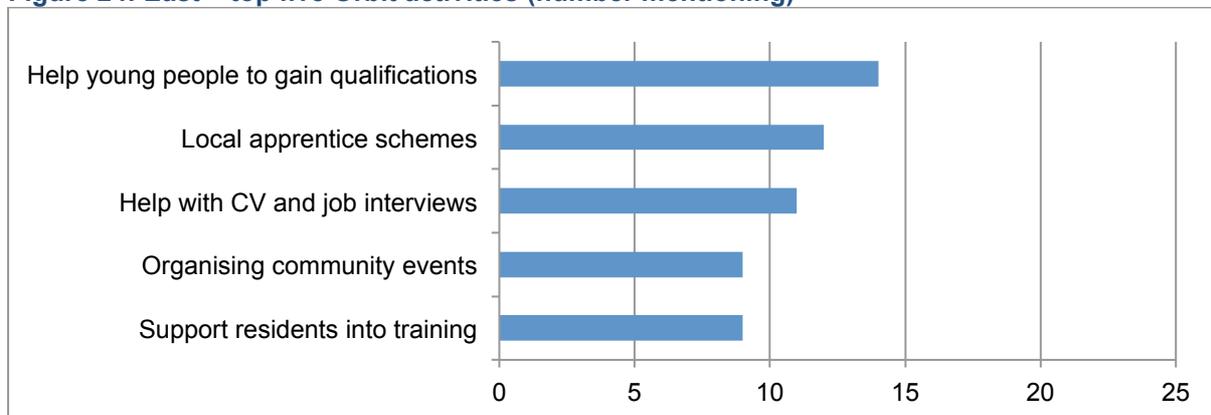


Figure 24: East – top five Orbit activities (number mentioning)



A weighted calculation of the overall responses by area and age reflects the order of the choices made and lists the most popular services residents would like Orbit to provide: helping young people gain qualifications, apprenticeships, community events, help with welfare and benefit advice, supporting residents into training, gardening and green space, and events relating to women’s health and well-being.

Over half the residents we interviewed did not know that Orbit provided community services and facilitated community projects, and almost all residents thought it would be a good thing for Orbit to be more involved in the community.

Many residents did not know that Orbit is involved in existing community projects; and most thought it would be a good thing for Orbit to become more involved – so long as the rent did not go up to pay for it. It was seen both as a means of developing local communities, and of improving communications with Orbit.

Responses to these questions included eight people commenting that it would help develop local communities, nine believing it would improve the overall communications with Orbit, particularly if they used phones and websites to publicise some of the opportunities, and five thinking it would show tenants that Orbit cared about them as people. On the other hand, nine residents thought Orbit should stick to their core functions and focus on improving the quality of their homes before providing additional services

Residents' ideas

As part of the interview process we took notes on residents' ideas for community engagement, ways Orbit could be more responsive and involved, and suggestions for general area improvements. The most commonly mentioned ideas and those which residents seemed most excited about are listed in the Figure 25.

Figure 25: Popular ideas proposed by residents

Reinforcing sense of community

- Offering gardening support for elderly residents
- Holding annual street parties
- Providing more meeting spaces, taking advantage of existing facilities, e.g. halls and kitchens
- Funding 'fun and modern' classes for the elderly such as tai chi, pottery, walking groups, foreign language lessons etc.
- Promoting community-run cafes
- Installing benches for outdoor relaxation

Management

- Holding consistent local office hours in easily accessible locations
- Developing an **online repairs tracking** system
- More Orbit staff, such as caretakers, living in Orbit properties
- Holding an advertised **residents' meeting** after each estate inspection
- **Involving young people** more in local ground maintenance
- Setting up **local skill exchange** groups
- Easily accessible and **up-to-date information** on welfare benefit changes

Representation

- Creating an **Orbit-wide residents' group**

Resident interview conclusions

- Orbit is widely respected as a landlord and generally provides good management and related services. Many residents readily acknowledge they much prefer Orbit to the private rented sector.
- Getting core management services right is crucial in winning residents' trust and problems can quickly escalate where the relationship goes wrong
- Communication is key to developing trust, and many residents currently find the organisation too difficult to reach and engage with
- The majority of residents do not attend community events and the findings from this report suggest that social contact is low. Yet there is a strong interest among residents in hosting more community events such as barbeques, showing a desire for more involvement and activity
- Residents have many bright ideas on how their area could improve and how Orbit could play a more proactive role.
- Orbit residents would clearly welcome Orbit's help in improving their economic circumstances such as job-related training, apprenticeships, CV writing, financial advice and wider employment opportunities
- Residents are generally not aware of the community services Orbit offers and would like to see Orbit get more involved. Providing more activities for the youth is a universal priority.
- Residents' general concerns align regardless of geography and special local needs. They highlight five top priorities:
 - Youth activities, support and job access;
 - Employment and job training;
 - Tackling crime and anti-social behaviour;
 - Welfare and money advice;
 - Support and provision for older people.

Chapter Five: Interviews with Staff

Overview

This chapter summarises the outcomes of 32 in-depth staff interviews conducted across all three case study areas. A complete list of staff titles interviewed can be found in **appendix 4**, but include housing and community officers, tenancy support workers, community engagement staff, income recovery officers, surveyors, caretakers, grounds maintenance staff and first-line and middle-managers. This range of input provided diversity of opinion gathered from across the organisation. We also attended two Orbit World Cafes – informal regional meetings of Orbit staff to discuss core questions and brainstorm solutions to inform the development of Orbit’s 2020 strategy – in order to identify whether issues raised during the Cafes matched our findings and to hear about more bright ideas. These comments were recorded, transcribed and analysed for common themes and ideas.

There are five main staff priorities:

- 1) **Communicating and engaging with residents** can be difficult because:
 - Staff engage with residents primarily as managers and enforcers rather than “talking to each other as people”;
 - The right personalities at staff- and resident-level are not always available;
 - Some housing association residents have vulnerabilities which make them difficult to engage with;
 - Core services are not always provided to the right standard or in the right way, making frustrated residents more hesitant about getting involved.
- 2) Need for a **strong frontline presence** is hindered due to:
 - Geographical spread and unfeasible travel times;
 - Limits to getting out and identifying issues on the ground;
 - Limited frontline resources
- 3) Local and technical **deficits in knowledge** and the **need for further training**. Staff feel they need:
 - More diverse and personal information on tenants, which can help target services;
 - More support on the details of the benefit reforms and who is being affected;
 - More support on understanding the green agenda, new green technologies, and general sustainability advice;
 - More expertise so they can pass on best practices to residents.
- 4) The looming **welfare and housing benefit changes**, of which elements of concern include:
 - The already existing income and debt problems many residents are facing, including fuel poverty and predatory lending;
 - Difficulties identifying jobs and training opportunities for workless residents;
 - Uncertainty over who provides clear, in-depth financial support to residents;

- A possible “tsunami” of arrears heading towards housing associations.
- 5) The importance of **partnerships** in developing community projects:
- Due to the successful use of an external partners “brand” in providing services of high quality that are one step removed from the landlord;
 - While recognising that partner organisations are severely stretched for funding;
 - While acknowledging the previously mentioned issues of targeting, communication and engagement;
 - While understanding that successful community projects require that “little bit extra” from frontline staff.

Other concerns relating to general **structural and organisational** complexities, such as the loss of the tenancy support workers in the East, problems with rural stock acquisition, allocation strategies, and holding residents more accountable to their tenancy agreements, were also mentioned.

While questions on **sustainability and green practices** were asked of staff, this seemed to be a topic surprisingly low on frontline staff’s agenda, or seen by them as a relatively abstract issue.

Evidence from staff – what we found

Some staff members have difficulties communicating and engaging with residents

Communication and engagement with residents is a major area of staff comment, with 13 staff members citing it as both important and problematic. Many staff members recognise, and three staff members explicitly stated, the need to establish long-term relationships with tenants. It was acknowledged that this meant having the time to “**talk to each other as people**”. One resident engagement officer stated:

People have so many fascinating abilities that we could tap into. One resident I talked to earlier in the week is really great on the computer and started helping me with social media stuff, but until I had that conversation with him I didn’t know that. You talk with someone and things open up, but you need to have the opportunity to do that first

Other staff members spoke about gaining residents’ trust through personal contact:

If we’ve made personal contact with residents, they are often the ones who respond because they know us, because they feel there is a connection there and feel confident

The need to identify frontline staff with **engaging personalities** was also highlighted by the interviews.

Several staff admitted that engagement had not been successful or was quite low:

Yeah, I’d say engagement with our residents here at the moment is low. We have struggled quite a bit. We need to keep trying, but I think that we just often don’t hit the mark with what residents want from us

Housing officers who have had success in engaging with residents were extremely proactive – door knocking, consistently speaking with residents, creating surveys and developing activities. One housing officer stated:

Unless people see your face and you are a visible person on the estate. I think it's quite hard to get a clear message out there and to start engaging with people... It's almost like a tactic really. To get myself in there and to get people to trust me and to get people to think – actually Orbit aren't the bad guys

The issue of how to engage more vulnerable tenants and problems around tenants being **challenging to engage with** was mentioned a dozen times by Orbit staff. One resident engagement staff member elaborated on getting tenants involved:

The trouble is, when people aren't working and they've got nothing to do and they've got no structure in their day – they just can't be bothered a lot of the time. So it's finding that whatever it is that motivates them

Furthermore, six frontline staff members stated that their primary contact with residents revolved around repairs issues. This included fire fighting urgent problems, resolving tenants' complaints around repairs and following up with the repairs team and residents. This activity was perceived by staff to be a reactive and often negative contact with residents. It was acknowledged that **poor core services provision later made it difficult to engage** with tenants in a positive proactive manner.

Stronger frontline presence:

In several areas – particularly the East and Heart of England – the large **geographical spread and unfeasible travel times** are cited as major barriers to developing resident contact:

You often just need to get out and see the residents. In London housing associations that's not difficult because you have 3,000 properties on your doorstep. Here I can drive down to one scheme and it'll take all morning, only to find that the residents aren't there

To get to know someone, you really need to do it face-to-face. You need to give them the information they need and then you need to go through it all again with them later. And that doesn't happen because of the distances we cover. What chance do residents have? Having a quick conversation over the phone? And how many residents can you get to in a day? I cover a huge range of areas. My mileage can go up to 12,000 miles per year!

Furthermore, in all areas there was a clear tension between wishing to spend time on the ground with tenants, but being prevented from doing so by increasing demands. Some staff members cited administrative demands on their time as limiting their work on the frontlines:

The job we do, because it's so varied, it's very easy to get bogged down in the day to day stressful things. You know, it happens to us all, you come in and have the best intentions of working on your community project, but you've got 50 emails and 20 people to call back and it can quite easily go further down the pile

Other staff members, particularly in the South, cited the increase in anti-social behaviour as a factor making huge demands on their time:

There is an increased polarisation in social housing... so a housing officer's patch becomes focused on the most vulnerable

Anti-social behaviour is constant, constant, constant!

Staff feel they lack local and technical knowledge and could benefit from further training

The four main areas mentioned by staff in which they felt they had knowledge deficits and could benefit from further training are:

- 1) More **personal information** on tenants
- 2) More **information on the welfare and benefit reforms**
- 3) A deeper understanding of the green agenda and **general sustainability advice**
- 4) More **expertise in specialised areas**, such as developing high quality care in supported housing or developing high quality digital inclusion tools

The first knowledge deficit area refers to the previous issue on engagement and communication with residents. Staff members believe that more up-to-date online information, including email and mobile numbers, and other details such as ages of children, current employment status, and expressed interests, would assist them with more effective targeting.

On knowledge deficits on welfare reforms and the green agenda, the general sentiment among frontline staff followed this staff member's attitude:

We need to spend more time training neighbourhood officers and frontline staff. We really need to get up to speed on these issues, so we can pass the information on and diagnose issues early. And that does require management to actually accept that they have to increase resource training and things to get the level of expertise up within the organisation. If we're trying to offer the best frontline interface, everyone needs to know what they are doing.

The World Cafés in particular brought out the desire of frontline staff to gain further accreditation and be trained to higher level. This came out in particular with frontline staff working in supported housing schemes. All said they would like more specialised training in order to tackle difficult situations. Several staff members wanted specialised training in recognising and dealing with dementia in their residents. One staff member complained:

We're not listened to by doctors and social workers even though we know the resident best, because we have no official training!

Digital inclusion and resident training on using the internet was also mentioned on half a dozen occasions as a way forward.

Digital inclusion will be essential with universal credit in order to manage online claims. This needs to be developed

Especially when the focus shifts to passing on information to residents, staff acknowledge that they will need to develop their own expertise:

We as staff will need more training, because our job is building brighter futures for people. We will need to be looking at the bigger picture, at the sustainability of the whole community. And to support and train residents as local authorities fall by the side.

Staff members are concerned about the looming welfare and housing benefit changes

Sixty per cent of staff raised concerns **about current and emerging debt issues**, with worklessness and high unemployment, predatory lending, and general poor financial management seen as the main drivers:

People are struggling – don't know where to go

Many people are on payday loans

People take out ridiculous amounts of debt

Staff members also acknowledge **fuel poverty** as a major issue that is often difficult to identify, with three staff members stating that they thought energy bills were top among residents' priorities.

With these existing difficulties in mind, staff show very high concern over the effects of the **looming welfare and housing benefit changes**:

We are assuming that there is a tsunami sweeping towards us of people being evicted

I expect that the take-up for tenancy support and money advice services will go through the roof

One staff member commented on needed **changes** within the organisation in order to cope with the financial issues caused by the introduction of universal credit and housing benefit reform:

We will have to constantly warn them against getting into arrears. We'll have to say – you're getting into arrears, soon you won't have a roof over your head. What are you going to do about it? – We'll have to be more business-like and say tough! Budget! But budget on what? I don't know – budget on less than you need to live on... I don't know how people are going to do that

All in all, there is general consensus that Orbit will need to provide a **more in-depth financial advice service** – through partner organisations or on its own – to residents in need, and that information will need to be readily available:

They [tenants] don't understand the impact there may be... Universal credit will be a big shock

Biggest shock will be not paying their rent when they have responsibility for it – "I don't pay rent – it's the council who does"

With no rent direct, people are not at the state of actively budgeting and knowing where their money goes

Staff members value the importance of partnerships in developing community projects

All the staff members interviewed were **positively engaged** in one way or another with community support agencies or projects:

Signposting to other agencies is one of the most important things

Tenants can learn to trust them and go to them if they need

Partners can provide services much better, and we can help fund a post rather than delivering it ourselves

It was also acknowledged that more partnership work could be developed with other housing associations:

*We will partner with anyone who will help. What **we don't tend to do is partner with other housing associations**, which is an opportunity missed, because two heads are better than one and we all have difficulties with our rural stock.*

All in all, partnerships are seen to be very flexible in meeting different needs, and both this and the Orbit approach of providing flexible funding was highlighted by eleven of the staff in relation to a range of projects. Furthermore, nine people noted the benefits of being involved in wider community projects, while acknowledging that this did demand “**a little bit extra**” from frontline staff in terms of attending after work board meetings, or dedicating themselves to a certain community project.

Furthermore, in relation to financial advice, three staff members commented that a **partner's neutral “brand”** has been extremely useful in providing information and support, due to Orbit's landlord status often deterring residents from engaging:

If we use the CAB [Citizens Advice] or credit unions to do the outreach, we have lots more success in engaging.

We've been struggling for years to be the first port of call for residents in terms of worklessness and so on, but people don't think of Orbit in that way.

However, frontline staff who work closely with partner organisations warn that **funding for many vital services is running out**. Many vital Citizen's Advice services, for example, are being cut. Orbit staff members highlight that this will be a huge loss to Orbit residents and to Orbit as an organisation.

Other findings:

Seven staff members commented on the **loss of the tenancy support workers** in the East. This was a new restructuring decision, which generated heated responses especially about merging the tenancy support role into the housing officer's role:

We cut the tenancy support officers – absolutely fatal in my opinion... I think it's a downgrade and a very poor step to have lost that. Because we are not going to get the same service by any stretch of the imagination once it's combined with the housing officers duties. And the next 24 months you are going to get loads of tenancy issues.

Especially in the East and part of Orbit Heat of England, staff felt that Orbit is **not geared towards rural specialism**, with small scattered schemes becoming increasingly difficult to stay in touch with and manage, let alone engage in any meaningful activity:

It's not viable for us to build lots and lots of two bedroom houses in villages far flung... It's probably better to leave that to a specialised housing association. I think Orbit is not geared towards that specialism. We are geared toward dealing with large housing developments and can't afford to pepper pot.

Three staff members also mentioned concerns about the local authority **allocation process**, the increase in vulnerable tenants, and the need for considered allocation of Orbit properties to a mix of tenants:

Not many local authorities are far sighted, and they tend to think – are they in priority need of housing? Are they vulnerable? Yes, here you go Orbit, you can have them. Fine, but I've got 50 properties and I don't want 50 vulnerable people all moving next to each other because that's a recipe for disaster.

Other staff comments included a perceived organisational gap between managerial and frontline staff, queries about the type of stock Orbit is acquiring, and an expressed interest in holding residents to greater account in observing their tenancy conditions.

Orbit staff also **held many positive views** about the work they do. Figure 26 below lists the responses of frontline staff across the three regions in regard to their relationship with the communities in which they work.

Figure 26: Positive staff comments

- ☞ *People need to see your face. You need to be visible on the estate... I'm in it for the long run really, to hopefully make things better longer term. And that's the thinking behind a lot of what I do really. To get people to trust me*
- ☞ *The team that I work in is quite proactive, and we have a manager who had quite a proactive approach to it. So we're lucky in that we have a good manager who cares about the community aspect of the work so it's always at the forefront of our minds*
- ☞ *For me it's about building up trust with my residents*
- ☞ *We're pushed for time, but we are a passionate staff here. It is important to us, our communities and developing them, we do see that as a big part of our role*
- ☞ *It's about how we empower our residents and other residents in the area and about securing what they need, It's about enabling, and because we do have quite a big voice in the areas we work in. We can go to a meeting and represent a hundred people and we can canvas people and have quite a sway. We can give the disenfranchised more of a voice*
- ☞ *We've had some fantastic community leaders in X over the years – people who work really hard in small groups*
- ☞ *Orbit is very progressive, and has become much more transparent in recent years, constantly seeking new ways to interact with tenants... Now we really do respond to the things they say they want from us*
- ☞ *It's really good when people say to us "That's great – I didn't know Orbit did this!"*
- ☞ *Orbit has a good infrastructure of services – repairs, service centre, and others – and we offer a lot of added value services around employment, training, resident engagement*
- ☞ *We do really good joint working with partners – and maximising engagement with tenants*

Green Agenda – what we've learned

The green agenda, sustainability and fuel poverty were mentioned 23 times by Orbit staff.

Our residents group has chosen fuel poverty as its first priority. So energy efficiency is key to residents and I think there is an awful lot more we can do. If you look at the breakdown of how our property is heated – some will be oil, many by electric storage – do people really know how to use that? Is it really the best source of heating for people?" (Resident Engagement Officer)

The real bold initiative would be to go out and look at the properties individually and then design a real balanced scheme around each property type. So you wouldn't necessarily change the heating in every property, but you might introduce some external cladding to improve thermal performance. This might be hard to manage, but to be honest employing three extra staff would probably be more effective than paying through the nose (Surveyor)

Senior staff list three priorities as their green focus:

- 1) Tackling fuel poverty;
- 2) Meeting national and international carbon reduction commitments;
- 3) Creating an affordable carbon legacy.

Orbit Heart of England is spearheading the drive for sustainability within the Group through a variety of projects including:

- Energy mapping and tracking exercises;
- A Passivhaus beacon project in Coventry;
- Fuel poverty self-assessment kits for residents;
- Energy advice sessions with local energy doctors;
- Area wide carbon assessments;
- Retrofitting and energy-efficient refurbishment schemes, including the pioneering Passivhaus standard retrofit mentioned above.

These projects have come about through partnerships with universities, contractors, local authorities and by working with residents. Orbit Heart of England staff acknowledge that training and education lies at the core of their sustainability drive. The Orbit Academy is setting up training programmes on energy awareness providing:

1. Mandatory training sessions for all staff to reduce consumption within the organisation;
2. Training initiatives focused on specific roles and responsibilities, primarily informing frontline technical and housing management staff.

When it comes to training residents in energy management, Orbit Heart of England staff members recognise the need for further training for staff and residents alike. The level of resident involvement in the drive for sustainability is low across the group. Orbit staff believe that activating residents is critical in order to get feedback on energy initiatives, as well as to win stronger buy-in and behaviour changes.

Staff ideas

Staff members have recognised and tried to act on the main priorities they identified – communication, engagement, training, welfare changes, accessibility, local partnerships – through various projects. Figure 27 below presents staff 'bright ideas' we came across that begin to respond to these staff concerns. Collecting bright ideas, brainstorming, sharing success stories across the organisation, and monitoring pilot projects is key in developing innovative services that plug strategic gaps in Orbit's provision.

Figure 27: Original ideas from staff on how to make progress in the community

- **Provide internet access** to residents by installing broadband and computers in village shops
- Encourage **Citizen's Advice** to hold sessions in children's centres and other community spaces
- Hold **Resident Summits** or town hall meetings with housing officers on days of estate inspections
- Organise a monthly **community bus** to take elderly residents to lunches and other events
- Develop **community gardens** through training in gardening skills
- Deliver **financial capability training** in schools
- Offer **food preparation training** for Orbit residents and members of partner organisations using Orbit sheltered and supported housing kitchen facilities
- **'Skip days'** – housing officers could organise a skip for community collections and stand next to it in order to meet and engage with residents
- Invest in **'community' bicycles** for resident use
- Set up **carer cafés** which encourage residents with dementia and their carers to socialise and access support and advice
- Hold more **Orbit world cafés** to bring staff from across the organisation together to brainstorm on how to take Orbit's mission forward

Staff interview conclusions

- Staff priorities:
 - Better **communications** with residents
 - A strong **frontline** presence
 - **Training** to close gaps in knowledge
 - Addressing the impact of **benefit changes**
 - Developing local community **partnerships**
- Staff are full of bright ideas on how to approach these priorities creatively. Chapter 15 expands on these ideas. Staff need to be encouraged in developing innovative approaches.
- Especially as frontline pressures increase, regular brainstorming sessions with staff will help air frustrations and generate solutions.
- Increasing staff confidence through training and sharing practical learning is essential in providing a high quality frontline service and maintaining motivation.
- The promoting of sustainability does not yet rank high on most staff members' agendas.
- Frontline staff that manage to 'give a bit extra' to tenants they meet, in terms of friendliness, community participation, door knocking, sitting on community boards and helping directly, are highly regarded in the community where they work and seem to enjoy their jobs.
- Frontline staff need to feel they are valued by the organisation.
- Staff concerns mirror resident needs. Staff feel that better communication and increased frontline presence would make a major difference. Staff also want training in the areas that are most affecting tenants – fuel poverty and energy saving, welfare and benefit changes, worklessness and employment strategies.

Chapter Six: Findings from community leaders

Overview

This chapter reports on interviews conducted with community leaders in the three case study areas. These include Orbit residents and non-residents who are actively engaged in the community. Our interviews ranged from Citizen's Advice staff to parish councillors, childcare workers, residents association members and many more. In all we spoke to 18 community leaders, which gave us deeper insight into our areas, provided us with an understanding of how Orbit is viewed as a partner, and what ideas exist regarding future community development. Our interviews identified the following community leader themes:

Community leaders feel they are good at:

- Understanding area needs
- Identifying and interacting with hard to reach tenants
- Providing centres for the community to meet
- Generating ideas

Community leaders feel Orbit is potentially a good partner, but:

- Would like Orbit to offer more supporting services to local organisations
- Would like Orbit to be more approachable and responsive to potential community endeavours
- Feel there is significant scope for the organisation to engage with the youth in their communities
- Feel that multi-agency partnerships are more important than ever and need to be developed in light of major cuts to funding and ever widening gaps in community provision.

Headline quotes and findings

The main themes listed in the summary were identified based on the analysis of thirteen interviews we conducted with community leaders in Bexley, Rugby and East Anglia. The following headline quotes support and illustrate these findings.

Community leaders feel they understand the area

Five leaders talked about the difficulties in engendering community spirit and finding residents willing to participate in the community.

It's about understanding the perception of the area. Locally, if you look at the housing lists for instance, if you want to house swap it will always say – anywhere but Brownsover! So it has a reputation. (Community Development Officer, Rugby)

One of our main problems from a social interactivensess perspective is that there just is none on site. There is no community hall, and no facilities... People set off at seven o'clock in the morning and get back at seven at night. So the last thing on their mind is doing something social after that. The interaction among people is quite bad. (Parish Councillor, Cawston)

Three leaders, particularly in Cawston and newly built areas in the East, commented on the absence of community facilities. For example:

By the time this site is finished there will be over 600 homes, so it's going to be quite a massive place. And yet, we haven't got a playground, we haven't got a school and all that is what is needed here and that's what I'm being told every day... Because this is going to be larger than some of the villages around us that have all of those things. (Parish Councillor, Carbrooke)

Community leaders claim they can identify and interact with hard to reach tenants

The question of how community programmes are presented was raised in a number of contexts. Orbit's landlord role was seen as a barrier, with two external organisations feeling that their own neutrality and influence in the community put them at an advantage:

I think there is a reticence from tenants to have anything to do with their landlord; it was very difficult to make contact with Orbit as a partner. But once they realised it was the CAB who were providing the advice and the guidance, it was much easier. So we dropped Orbit, or the landlord part of the thing. (Financial Capabilities Officer, Citizens Advice Rugby)

We know we can't badge our invitations as from the local authority or from Orbit – if we badge them with the NHS logo then people will come (Children's Centre, South)

Community leaders and their organisations provide centres for the community to meet

From child care centres and council-owned allotments, to church halls and old and newly built community centres, community actors have created and are creating self-sustaining spaces where people naturally meet and interact.

What we've recently got from Taylor Wimpey is a small portacabin that they're just refurbishing as a community space for us now. The portacabin has no toilet, but it has a kitchen area – and you know from little acorns big trees grow. We're planning on holding coffee mornings there for the community. (Parish Councillor, Carbrooke)

We contacted the community to find out what they wanted and it became evident what was required was a community hall. Once the community centre is open it will allow for a whole series of activities on our site that just never existed. (Parish Councillor, Cawston)

Our space was designed as a drop in centre, and we provide rooms for whatever purpose... We have lots of community groups that hire the room – so we have groups like alcoholic anonymous and the crime reduction initiative here... We also now started putting on different classes for the community, so computer lessons and we have a few art groups. (Brough Scott community suite, Newmarket)

Community leaders generate ideas

There are many projects and approaches that interviewees thought were successful, and which community leaders thought Orbit could contribute to and could learn from. Each person interviewed suggested some promising schemes, including better access to advice through a Citizens Advice online referral system, community garden projects, local crime prevention projects, youth clubs, diverse training opportunities, volunteering programmes and community surveying projects in order to develop local knowledge.

Community leaders seem to have a generally positive relationship with Orbit

Generally Orbit is seen in a positive light by partners. Six people specifically paid tribute to the good relations they have with Orbit, and the fact they take a lead in community issues.

Orbit is quite good, they listen. They started up the project group with all of the main people to do with the development and were trying to push things forward. So Orbit seem to be the major player. (Parish Councillor, Carbrooke)

Orbit's been very good. We did a project funded through investment in communities about three years ago, where we specifically targeted residents of Orbit Housing. That was a success... [Orbit's] offered funding and they also advertise our company and the courses we offer. And there was a leaflet passed around to the residents in the area. So they've been very active in trying to promote what we're doing. (Skills Start Here Social Entrepreneur, Norwich)

Community leaders would like Orbit to provide more support services

Four people particularly valued the core skills and information which Orbit had and could offer to community groups:

It would be nice for [Orbit] to be more active in fundraising, finding funds or maybe just providing a fundraising officer. It would be helpful to have someone who you could ring whose main job is funding. And for them to say – yes we'll come out, we'll spend a morning with you and we'll show you how to go through funding applications, how to put the right words in for the right people. That would be helpful. (Parish Councillor, Carbrooke)

It would be great if Orbit could help us with some technical help around planning and legal stuff (Community leader, Becton)

What we'd like to know from Orbit Housing is – where their social housing is, what the situation is like. So for instance, are they mostly full, mostly empty, what is the waiting list like, because we need to provide that information when we have parents asking about moving, swapping houses and that kind of thing. (Director of children's centre, Cawston)

Others felt more of a physical presence on the part of Orbit would be helpful:

I think if Orbit would like to be more involved, I think there is a good scope there to start talking. One thing that would be useful is to invite someone from Orbit along to our meeting and talk with us and to perhaps think about areas where we could work together. (Member of Brownsover Resident Association)

I think Orbit once a month, or once every two months, should actually come on all of these sites, hold an open surgery for a day and let people come in and talk to them - even if it's to just discuss their rent or anything like that and actually put a face to the organisation. (Parish Councillor, Carbrooke)

Community leaders would like Orbit to be more approachable and reactive to community suggestions

Two people worried about the flexibility with which Orbit frontline staff could act to make partnerships work:

Well, yes, Orbit eventually was a supportive partner. It took a while because of their bureaucracy and I think they're quite strict on protocol. It took several meetings and maybe a little bit of pressure... to get them fully on board. So that's just to be honest. (Community Leader, Rugby)

A further four leaders questioned Orbit's ability to engage with tenants and their clients, especially with regard to reaching the more vulnerable clients:

A lot of problems Orbit seems to have are about engagement with their own tenants (Local authority partner, Becton)

There are people I know of that won't leave their flats because they've been intimidated by other residents, for example, and they're scared to come out. So they need someone to go in, but they're often not brave enough to ask. So you lose tenants that way. (Community worker, East)

Community leaders feel that Orbit could do more for youth

Provision of youth services was one of the most dominant themes emerging from the community leader interviews:

*We have a high concentration of young people... So we've increased youth activity up here. **I think the youth bit is crucial**, and the next stage is starting to tackle employment. And I, for instance, chair the youth consortium, which is the mechanism which has considered how to integrate these youth services in the area. Because I don't divide our communities up between adults and young people, they are all part and parcel of the same thing. (Community Investment Officer, Rugby)*

***The schools are fit for bursting** and we need not just one play area but two or three. On a site this size there should be two or three play areas, we are currently struggling to get one. And today when the government is promoting getting the kids off the sofas and outside and being healthy, I find that very ironic. (Parish Councillor, Carbrooke)*

*I probably spoke to twenty or thirty young people during my financial capability training and it was twenty to thirty young people who had just moved in and really did need the help, really did need the support, and just had no idea (laughs). And those could be several hour sessions... because young people, they are a bit vague about the difference between a need and want... **So working with young people has been very profitable.** (Financial Capability Advisor, Citizens Advice, Rugby)*

*Orbit have funded a youth programme and we did it for a year... and I think that was extremely critical. There is a view **that if young people are given services on Brownsover it provides a service for the rest of the community.** And I think the important thing there was that Orbit was looking in a holistic sense at the community. (Community Development Officer, Rugby Borough Council)*

Community leaders and their organisations are suffering from funding cuts

Six people raised specific issues about cuts and funding reductions. This affected safer neighbourhood teams, children's and youth provision, funding for business start-up, and reductions in the provision of local services by central and local government agencies such as Job Centre Plus.

The importance of partnerships and multi-agency networks was acknowledged as a major outcome of funding cuts, as the director of the childcare centre in Cawston explained clearly:

***I think the key for us is multi agency working.** We can't do everything on our own... We are constantly in consultation because our services need to evolve with what families want, but we can't do everything on our own, so it really is about multi agency partnership working, and getting as many people on board... And if we can't do it we are able to signpost what agencies are.*

Community leader interview conclusions

- Community organisations have developed specific knowledge expertise that can be tapped.
- Community organisations are suffering from funding cuts affecting services used by residents. Many previously funded community positions are becoming voluntary out of economic necessity.
- Community organisations feel they offer the benefit of acting as a neutral presence.
- Community leaders would like to tap Orbit skills and information – particularly around tenant needs and funding advice.
- Community leaders are keen to establish closer ties and working relationships with Orbit staff. They feel that Orbit could be more responsive to grassroots ideas and work more directly with them.
- Orbit staff generally support community partnerships and the role of community leaders, while community leaders have a strong desire for further engagement with Orbit staff. In our final chapter, we propose a stronger framework for delivering on this potential.

Summary of stakeholder suggestions

The following practical proposals summarise the suggestions from staff, residents and community leaders:

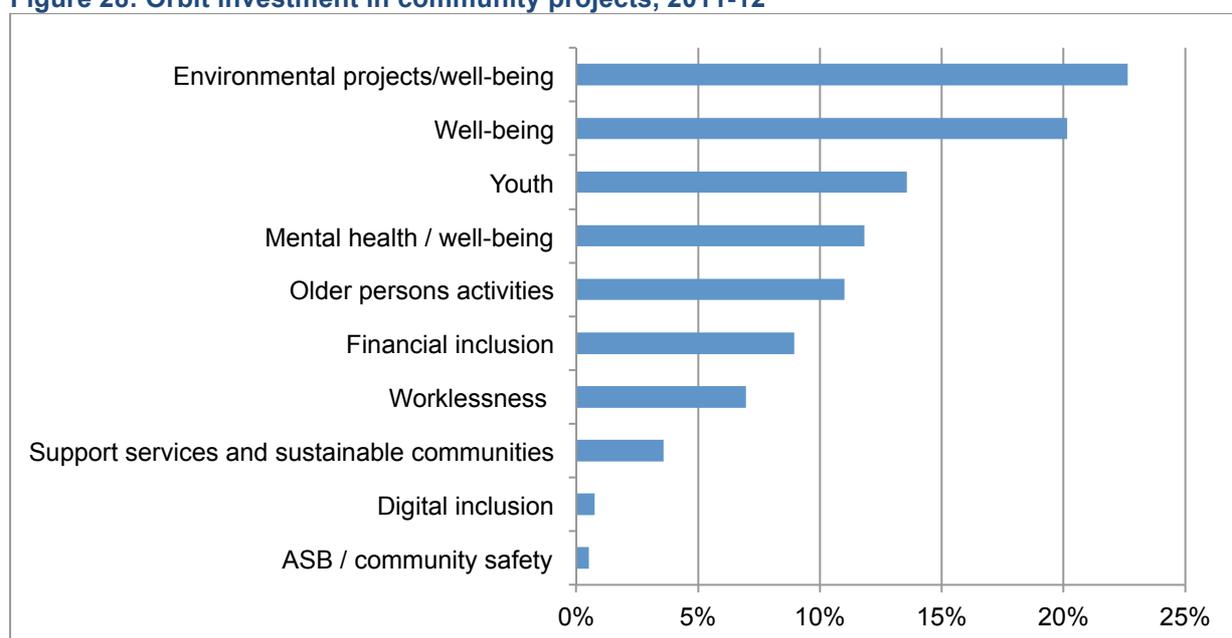
- Staff, residents and community leaders want more **training** to develop skill sets and improve their areas.
- Getting the **basics right** was seen by all groups as essential. If repairs and management work well, then community investment will respond more directly to frontline needs because staff and residents will be more closely in touch.
- Doing more for the **youth** was a theme that came up with residents, staff and community leaders alike. Helping the youth into activities was seen as beneficial to the whole community, with long-term dividends.
- **Local bright ideas** developed by residents, staff and community leaders provide a valuable tool for sharing good practice across the groups, offering creative and effective responses to growing community needs. Acting on them will build stronger community spirit.
- Developing stronger **expertise** and high-level support for community investment would generate stronger action on the ground. This related particularly to welfare reform, community funding support and gardening and sustainability advice.
- Orbit should actively **partner**, support and encourage local organisations providing a high quality service in the area.

Part 3: Findings from the ground – community projects and ingredients for success

Chapter Seven: What’s happening in practice and what can we learn from it?

Orbit Group invests in a variety of community projects. It displays a commitment to meeting social need and we have uncovered many valuable projects. Over £1m was spent on a range of community investment projects in 2011-12 as shown in Figure 28.

Figure 28: Orbit investment in community projects, 2011-12



We came across 25 community projects during our two months of fieldwork in Bexley, Rugby and East Anglia. We have discussed these projects with community actors, Orbit staff and participating residents in order to identify their purpose and merit. These existing community projects give a feel for the level and depth of community engagement in areas with Orbit properties. We have listed and described the 25 projects plus a full list of social investment across the Orbit Group in **Part 5 of Volume III**.

Out of the 25 projects we chose **ten exemplary projects** detailed in Figure 29. This choice was based on strong positive feedback we received from several sources, their alignment with the issues and concerns brought up during our tenant interviews and their often unique and creative approaches to developing local capacity. The ten exemplary projects span geographic area and thematic content.

To provide more detail, two out of the ten exemplary projects are described fully in this chapter with the remaining 25 detailed in Part 5 of Volume III. Many of these examples seem to be in their early stages, with potential and indications of success and thus provide possible models for future project appraisal and development. Our ingredients of sustainable and successful community projects in the following chapter draw on the initiatives we have come across and offer a framework for assessing existing and proposed projects.

Figure 29: Ten exemplary community projects

Project	Location	Orbit Partner Led	Description
Financial Capability Training, Citizens Advice Rugby	Brownsover, Rugby	Partner	Developed with the University of Bristol, the project offered two one-on-one sessions with Orbit residents . The sessions cover spending habits, advice on maximising savings and using the right financial products.
Bishops Itchington Sustainable Community Garden	Warwickshire	Orbit	To tackle high levels of ASB, the community officer initiated this project to regenerate an area of the estate by creating a community garden . The project cost approximately £13,000 and came from the Orbit Community Investment Fund. Residents are trained in community growing, and they are included in the design of the space.
Mencap Food training, Orbit	Stratford	Partner	Opening sheltered housing kitchen facilities to members of Mencap Stratford, an organisation for people with learning difficulties. This has been prompted due to centres for people with learning disabilities closing. It is hoped that this will give members a meaningful occupation while also entertaining and feeding the residents of the sheltered housing estate.
Blenheim Grange Community Partnership Project	Carbrooke, Suffolk	Orbit	Initiated by Orbit in order to develop partnerships on the new estate. The aim is for the project group to secure services on the estate in the future. The project group has developed an action plan and has surveyed the community to identify top community priorities .
Brough Scott Community Support Suite	Newmarket, Suffolk	Orbit	A drop-in centre and community room with the goal of supporting residents in their tenancies, but additionally providing employment support and developing community activity. A part-time resident advisor provides tenants with support, courses, volunteer opportunities, and a place for community groups to meet. The aim is to bring services close to the residents.
Skills Start Here Decorating and Training	Norwich, Norfolk	Partner	Redecorates the homes of vulnerable tenants and provides training opportunities for people interested in decoration. Developed model with other housing association: train homeless in sheltered housing to decorate housing association homes in need of repair. Develops skills of sheltered residents while improving property that they may eventually live in.
Credit Unions	Bexley, South East	Partner	Includes Surrey Save, Croydon Savers, Kent Credit Union. Brings residents into the habit of saving and develops financial awareness . The joining fee for residents is covered by Orbit. Incentives are given to residents – e.g. money matching all savings up to two months.
Positive Futures Youth Programme	Brownsover, Rugby	Partner	OHE provides funding for the Positive Futures, a youth provision project including sports sessions, drama and arts, self-development, accredited training, volunteering and intergenerational and community cohesion work.
The Open Door Employment Project	Brownsover, Rugby	Orbit	The Open Door project provides support to residents wanting to gain employment Depending on individual need, this can range from confidence building, job applications and interview skills, or in work support once residents start a job. This has been delivered by one full-time and one part-time employment development officer.
Doorstep Learning (Step Up)	Bexley, South East	Partner	Connecting residents with education / training / work experience . All projects are very local to residents. A trial was completed in Margate with good feedback.

Example of a successful Orbit project

Brough Scott Community Suite, Newmarket

The Brough Scott Community Suite is a drop-in facility and community room located in a second floor flat in the centre of a 200 unit Orbit estate in Newmarket Suffolk. This multipurpose facility opened two years ago and provides basic resident support, a space for local organisations to meet, courses, and computer access for Orbit residents. A part-time resident advisor is on site three days a week and the space is otherwise accessible to community groups such as narcotics anonymous, alcoholics anonymous and the crime reduction initiative. Computer courses and arts and crafts sessions are also held in this space, and with the help of tenants the resident advisor has developed a community garden area with vegetable and flowerbeds on a nearby former waste site on the edge of the estate.

We now started putting on different classes for the community... and people are saying, well it's the highlight of my week, it does me more good than my medication. And it's also giving them friendship groups, which is awesome

The resident advisor works closely with the caretaker, who refers issues regarding resident complaints, ASB problems and issues such as substance abuse onto the centre. The resident advisor claims:

I know the centre is working...I kind of diffuse situations, people get very frustrated and obviously if they're on drink and drugs it can escalate. They can come in here and rant and rave and know that I will sort out whatever it is that's frustrating them... the atmosphere around here is so much nicer. We don't get these highs and lows like we used to get

While funding for the centre may be in jeopardy, the resident advisor is looking ahead at ways to develop. Future ideas include asking a Citizens Advice Office to hold local office hours in the centre, expanding the suite to include a kitchen from which food-training courses could be held, and one-on-one advice sessions between residents and an Orbit advisor.

Example of a successful external and partner project

Brownsover Financial Capability Training³

Led by the Rugby Citizens Advice, the University of Bristol and funded by Santander, this project aimed to provide two one-on-one hourly sessions with the Citizens Advice financial inclusion manager and Orbit residents on financial capability. Topics such as spending habits and behaviours were covered, along with prioritising certain expenditure, maximising saving and using the right financial products. The financial inclusion officer managed to reach 160 Orbit residents with £10 shopping voucher incentives, of which 30 were young first-time tenants.

For young people, they are a little bit vague about the difference between a need and a want... A lot of people were just really using the wrong bank account and were just sold the wrong type of thing. They had no idea what credit unions were, were being

³ Collard, S. Finney, A. Hayes, D. and Davies, S (2012) *Quids in: The impact of financial skills training for social housing tenants*, Bristol, University of Bristol

tempted by doorstep lenders at extortionate rates and we were able to steer them away from that. So working with the young people has been very profitable

The programme piggybacked on the initial success of the Horizons programme, which was supported by Gingerbread and Barclays, and offered financial capability training to single parents in the community. Several women participating in the programme from Brownsover were awarded with adult national learner awards, one of them stating:

It is very hard to put into words how this course has changed mine and my family's life. It enabled me to make some major changes, for instance, I changed bank accounts saving me a monthly account charge; I cancelled unnecessary direct debits such as Satellite cover as replacement can be brought cheaper; re-looked at my mortgage enabling me to pay off one part of it; thinking before shopping.

Funding cuts to Citizens Advice as of September 2012 mean that the Financial Inclusion manager's post has been cut and replaced by ad-hoc volunteers. With the benefits to Orbit clear, it is worth considering whether future partnerships could save this important external service.

Ingredients of successful projects

We have developed ten basic guiding points tested against the seven projects outlined in Chapter 5, as well as other projects we have come across in our three areas, and based on successful community project case studies we have gathered over ten years at LSE Housing and Communities. We believe these are tried and tested ingredients help us to outline a robust framework for all wishing to evaluate the potential success of community projects. We summarise these ten ingredients for success below, and in the following chapters explain the different ideas, influences and policies that will shape Orbit's future social investment. Chapter 10 integrates the ingredients directly into the framework we have devised.

The ingredients are:

1. **A practical, fundable, achievable plan** that:
 - starts with the basics;
 - carries out a careful assessment of need / demand, resources, capacity, barriers;
 - can hand-hold, advise and defend the project over time;
 - proposes an achievable, realistic time frame with clear stepping stones;
 - has identified funds at least for the medium term.
2. **Strong community links and direct community involvement** – community representatives need to be grounded and have common sense, be available and non-confrontational.
3. **A clear plan to recruit community volunteers and offer training** to help sustain projects and spread support. It is important to uncover the training and job potential for community members in projects.
4. Frequent **face-to-face contact between organisers and targeted communities** to build confidence and trust, in order to make projects more resilient.
5. An **energetic, entrepreneurial, problem-solving organiser** with community experience.
6. **A track record of success** in related areas showing capacity, drive and potential.

7. **Brokering with different stakeholders, partners and local actors** to build a wide base of support.
8. Assessing the **long-term potential of a project** and its **social and environmental impact**. Using this to monitor developments, take-up and actual contribution.
9. A **code of conduct and ground rules** for staff and residents, developed project by project from a common framework, to help prevent and solve problems. This forces all parties to think through risks, methods and solutions.
10. **A magnet** to draw in families, young and older residents, to ensure **local participation** e.g. tea, snacks, children's activities, crèche.

The value to Orbit as a landlord and social enterprise of its community investment lies in:

- How far it helps communities;
- How well it targets need;
- How carefully projects are implemented;
- How successful they are.

Orbit needs to carefully assess, project by project, new proposals based on the ingredients we have identified. Figure 30 shows how these ingredients apply to a varying extent to Orbit projects outlined in this report. All projects should strive to cover as many ingredients of success as possible to work well.

Figure 30: Orbit community projects and ingredients for success

Ingredients for successful projects	Projects in this report which match particular ingredients
Practical, fundable, achievable, careful planning	<ul style="list-style-type: none"> • Blenheim Grange Partnership Project • Brough Scott Community Suite • Peer Research Project • Community Garden, Bishops Itchington • Mencap Food Training • Open Door Project • Door Step Learning • Positive Futures
Strong community links	<ul style="list-style-type: none"> • Brownsover Financial Capability Training • Community Garden, Bishops Itchington • Mencap Food Training • Credit Union • Open Door Project • Door Step Learning • Positive Futures
Training and job potential	<ul style="list-style-type: none"> • All apply
Frequent face-to-face contact between organisers and the community	<ul style="list-style-type: none"> • Brough Scott Community Suite • Brownsover Financial Capability • Peer Research Project • Positive Futures
Track record of past success	<ul style="list-style-type: none"> • Skills Start Here • Brownsover Financial Capability
An energetic, entrepreneurial organiser	<ul style="list-style-type: none"> • Skills Start Here • Brownsover Financial Capability • Community Garden, Bishops Itchington
Wide base of support with other partners	<ul style="list-style-type: none"> • All apply
Measuring longer term impact	<ul style="list-style-type: none"> • Peer Research Project • Community Garden, Bishops Itchington • Brownsover Financial Capability • Brough Scott Community Suite
Established code of conduct and ground rules	<ul style="list-style-type: none"> • Credit Unions
Offering a magnet	<ul style="list-style-type: none"> • Community Garden, Bishops Itchington • Brownsover Financial Capability • Open Door Project • Door Step Learning • Positive Futures

This schema, set out in the left hand column, should be used as a tool for project planning and for assessing the feasibility and sustainability of specific project proposals, e.g. a youth club in Becton, allotments at Brownsover. To demonstrate the value of this tool, we apply it to the peer research experience, in relation to energy saving.

We have found that these ingredients are especially successful when they include the following six practical steps:

- A plan that is checkable by other people;
- A secure source of funding for the duration of the project;
- Market research that shows there will be a big enough take-up;
- Monitoring how many people use the service, through a daily register or other recording methods;
- Feedback mechanisms that keep tabs on the project's social impact, e.g. through a work diary;
- Regular visits by managerial staff, to receive updates and assess the progress of the project.

These steps are simply ways of applying the ingredients for success at a practical level. We explore them in greater detail in the framework set out in Part 4.

Overview

Following the ingredients for success and the practical steps needed to implement them, as set out above, will help guide investment decisions, but there are risks. The main risks can be relatively easily identified as the converse of success factors. If a success factor is the right personality and skills to deliver the project, coupled with suitable experience and hands-on know-how, the risks include:

- The experience claimed is less solid or relevant than expected;
- The personality of a staff member clashes with other participants;
- Delivery of the project is held up, prevented, diluted by someone blocking progress beyond the control of the deliverer / implementer.

Our research into Orbit's current social investment shows how significant the social impact and benefits can be of relatively modest investments. Orbit is now at a critical point in deciding on priorities and ways of working over the next few years. By structuring all of its social investment around these ingredients, it can make an even bigger impact on communities that are under increasing pressure. In Part 4, we develop three possible scenarios for Orbit's future approach to social investment, along with associated risks. We then consider the options for social investment and set out a framework for delivering maximum value.

Part 4: Our framework for social investment

Chapter Eight: Scenarios for community investment

Overview

In this study, we have asked 120 residents, 32 staff and 18 community leaders about community needs and initiatives in order to assess what they value most and what helps them most. We have examined the work of other social landlords to see what models are most useful to them and we have looked at government proposals for Big Society-related activity and for community investment, as detailed in the recent Social Justice White Paper. We have also visited and talked to staff, residents and partner organisations involved in community projects, and conducted an innovative research, training and community investment experiment with Orbit residents through the use of peer researchers in carrying out this study (see Chapter 3).

From this wide base of evidence we have devised three scenarios for Orbit's future approaches to community investment (Figure 31). The first scenario means continuing very much as now, with a 'Freeway Community Chest' model, sustaining current levels of investment with a responsive, but scatter-gun approach. The second scenario means increasing the level of investment to keep the 'community chest' approach, but to expand the training and community volunteer model to encourage residents to make an active input into community and social needs, in exchange for skill training, valued experience, work and community recognition – the 'Invest to Save' model. The third scenario would incorporate both these approaches, while creating new capacity within Orbit to drive the whole 'Triple Bottom Line' approach through its frontline services. The 'Triple Bottom Line' derives directly from Housing Plus, an idea from the mid-1990s, arguing that housing associations should fulfil their social as well as their housing role, by integrating social, economic and environmental approaches to investing in communities. This integrated approach requires a small cluster of experienced staff at the centre to support the active involvement of senior staff along frontline staff and residents. This scenario requires careful planning to implement action across key activities such as energy saving, welfare reform, elderly care and financial advice.

In order to deliver on any of these scenarios, Orbit needs to assess the options available, both for funding and for delivery. Therefore as part of this study, we have looked carefully at new models of finance and government proposals to 'out-source' the social investment it sees as necessary and beneficial to society as a whole. Chapter 10 considers these options before outlining a framework for Orbit's social investment.

Figure 31: Scenarios for Orbit's community investment

'Freeway Community Chest' model	'Invest to Save' model	'Triple Bottom Line' model
<ul style="list-style-type: none"> • Doing 'as now' on community front • Lots of small, disparate projects • Many bright ideas • Some significant impacts • Some lost opportunities • Strategic priorities not clearly visible or promoted • Financial inclusion • Work • Well-being / elderly • Children & youth / community 	<ul style="list-style-type: none"> • Raise profile and status of strategic priorities • 'As now' plus deploy resident volunteers • In-depth training for volunteers using 'training first' residential model alongside local support • Build on peer research training model to tackle: <ul style="list-style-type: none"> - energy saving - financial advice / support - social care - children & young people • Needs strong leadership and capacity to deliver 	<ul style="list-style-type: none"> • Link 'Invest to Save' to social landlord responsibilities • Tried and tested over many areas • Modify staff structure to reflect the 'Triple Bottom Line' • Introduce strong frontline focus • 'Big up' face-to-face contact • Develop entrepreneurial approach to social projects • Assess income streams to foster social investment • Measure inputs and community benefits
RISKS		
<ul style="list-style-type: none"> • Shrinking resources • Some failures • Unsystematic approach • Hard to sustain or monitor • Short-term, one-off; little lasting impact • Overshadows wider needs • Reduces ambitions • Does not influence overall ambition 	<ul style="list-style-type: none"> • Level of support • Bridging gap to residents • Upfront costs where pay-back is longer term • Strategic focus can reduce local initiative • Lack of steady hand-holding • Not strongly enough integrated with high-level decisions 	<ul style="list-style-type: none"> • Loss of capacity for quick response • Diversion of energy into measuring and monitoring • Experimental focus weakens • Can be over-ambitious, diluting core housing role
GAINS		
<ul style="list-style-type: none"> • Lots of projects and partners • Staff conscious of social focus • Some communities benefit • Valid experiments • Potential demonstrated 	<ul style="list-style-type: none"> • More visible, recognisable priorities • More resident participation • Skill building • More social focus for group • Environmental benefits 	<ul style="list-style-type: none"> • Social landlord task becomes more interesting • Staff develop motivation • Attracts new skills into Orbit • Expands social enterprise • Attracts wider recognition and support • If done well, can create unique long-run synergies

Conclusion

The three scenarios offer a 'cumulative' plan. Starting where Orbit is now (scenario one), it is worth investing more resources to save some costs that Orbit is likely to incur in the near future such as higher demand for elderly care, more household insolvency, higher energy costs, costs impacting on arrears. This 'Invest to Save' approach, under scenario two, can be built on to combine the kind of close, frontline management and more strategic focus on social investment that will place Orbit at the forefront of new thinking in the housing world.

Chapter Nine: Exploring social investment

Overview

One of Orbit's biggest challenges is identifying how to find resources for social investment, working out how to ensure value for money, and how to develop a robust framework for social investment given current constraints. The social return on investment tool measures the long-term gains to society of incurring short-term costs through social investment. It has a long history in the post-war era. The current government hopes that it may generate private investment for social gains. However, here we examine the social benefits of investment in a more holistic way to understand the long-term non-monetary value to society of addressing social problems. In this chapter we investigate how the concept applies and informs Orbit's community work.

In all the debate around social finance, it is easy to forget that we have a powerful, all-embracing, set of on-going social investments already. Our core public and social services – health, education, sanitation, transport, environment, housing, childcare – fit within the framework of social finance, producing a major social return on investment. They are supported without serious challenge, in spite of budget cuts. This is because the social return is widely accepted to far outweigh the costs. It is the extra, innovative, 'bright new ideas' and special projects that struggle to secure funding. Also the more peripheral, less 'life-and-death' needs around community and social relations are harder to measure in order to prove the value of in cash terms, measure or fund.

To justify extra social activities, Orbit has to examine and assess the potential problems and costs of leaving a problem (e.g. rent arrears, anti-social behaviour) unattended or of tackling it only after the problem has arisen, as compared with investing to prevent it or to tackle it early on. The record of success in social and community interventions most often shows a **non-financial** return, but Orbit has to fund social interventions for social rather than monetary reasons. To help justify this approach, we look at efforts to justify social investment, including the government's own models.

The problem of social investment

Investment means putting resources into an activity, service or structure. Return means the payback from that resource input – how much does it produce for the investor? Social return means a result that benefits society, that improves people's lives in non-monetary ways, and that improves social relations. By definition, **social** (non-cash) paybacks are hard to measure. This makes any agreement between investors and service providers extremely difficult. Contracts or agreements to deliver a social return on investment are notoriously complex with risks that are hard to share between investor, provider and beneficiary. For this reason social investment usually happens when there is a **direct interest** in a better social outcome, e.g. factory owners in relation to workforce conditions, or social landlords in relation to neighbourhood conditions.

A major complication with measuring social return is that social benefits accrue over long periods, sometimes a generation, for example with early child care programmes such as SureStart. They also sometimes accrue indirectly, i.e. not necessarily to the investors or the people directly concerned, but to the wider society, e.g. whole families benefit from better work conditions or better housing. So child care may be funded by the Department for Education or the Department of Health or an employer. The long-term benefits may accrue to job markets, as well as some beneficial outcomes in education and health.

In addition it is extremely difficult in measuring social returns to control all the variables involved, including unplanned inputs and influences that contribute to a positive social outcome. Economists work on this problem and produce complex formulae, models and equations in an attempt to capture the real costs and benefits of social investment, but argue that it is often difficult to capture accurately all the factors. Because of these complexities, estimates of the social return on investment are often unreliable, inaccurate and questioned by private investors.

Understanding of the issues around a social return on investment can help Orbit in its approach to social investments of the kind Orbit wants to make. But it is first useful to understand the background to the idea and why the current government hopes it will become a tool for attracting support.

The experience of social investment

New Labour was keen on the idea of a social return on investment. Some policies flourished as a result – SureStart, preventative policing and neighbourhood management among many others. These popular programmes need long-term revenue funding, but the idea behind them was that the long-run benefits far outweighed the upfront costs. With the change of government, frontline preventative services have proved vulnerable to cuts under the localism agenda, police reform and direct budget cuts. Even where the social return is clear, and there is some evidence of actual cost savings, social investment is:

- a) Notoriously 'fashion prone', i.e. it goes in and out of favour, depending on leadership, funding and events (e.g. media coverage);
- b) Easy to cut in hard times, since it is invariably delivered through voluntary or other arms' length bodies, yet heavily dependent on government funding;
- c) Seen as a luxury, since governments and public opinion tend to respond to harsh visible problems that have direct negative impacts, rather than take steps to prevent problems before they arise.

The social return on investment is often easier to argue for programmes that tackle severe problems, (e.g. drug abuse, children in care, prison), rather than more general community investment that leads to social well-being and reduces the risk of acute problems building up.

The coalition government is extremely keen on Social Finance, a privately-backed funding mechanism, investing in tackling hard core problems through a financial mechanism known as Social Impact Bonds. Social Impact Bonds and social finance are new ways of tapping private resources to invest in social interventions that will provide a financial payback to the private investor, to government as the instigator and underwriter of the intervention, and to the service provider who tackles the problem. Criminality, violence, drug and alcohol dependency, children in care, homelessness are all severe social problems, with high social and cash costs that can be solved through major social interventions, and can therefore save money.

So far social finance has barely got off the ground and has produced only one, not yet fully tested, experiment (the Peterborough Prison experiment to reduce the rate of re-offending ex-prisoners). There is little evidence that a direct financial return can be secured without government underpinning. In the end, the government pays the service provider (usually voluntary sector), while the private investor puts in some capital to cover input costs. The private investor receives a return guaranteed from the government; the provider receives revenue; and the target group (e.g. ex-offenders) improves outcomes, this saving the costs to the public purse (e.g. the cost of re-offending and returning to prison). It is a win for all parties as long as the delivery agency achieves the tough goal, in this case, preventing reoffending in a large majority of cases.

Familiar models of public social investment

The Early Action Taskforce (involving bankers, the Big Lottery, charities, churches, government, social entrepreneurs, NGOs) has worked for over a year to prove that early interventions in social problems will save money later; e.g. preventing reoffending is cheaper than a further sentence; helping a family is cheaper than taking children into care; preventing a bad accident is cheaper than hospital treatment. However measurement of the benefits of social return on investment are so hard to measure that evidence is rarely robust enough to win the policy argument against the prevailing climate that preventative social spending is a 'luxury we cannot afford'. Cutting costs on 'extras' is easy to justify, whereas spending on problems that haven't hit the headlines is hard. Therefore early action, cheap and popular as it is, e.g. children's play areas, youth programmes, are 'going down the pan at a rate of knots'. This makes it important for Orbit to be clear about its priorities, while not expecting direct cash gains in the short term.

Reasons for social investment by landlords

For social housing organisations, there are many reasons for making social investments; in order to make landlord services more viable and more rewarding both for staff and for communities, but also for society as a whole, i.e. the long-term backers of social housing provision.

- Collecting rent and keeping arrears to a minimum require positive personal relations with tenants and preventative engagement; it also requires advice, support, sanctions, enforcement, while sustaining communities.

- Keeping properties occupied and tenants satisfied requires frontline management in the same way.
- Ensuring peaceful occupation by reducing nuisance can best be secured by preventative programmes.
- Reducing disputes and anti-social behaviour goes hand-in-hand with community involvement and local intensive management.
- Indirectly supporting rent payments and reducing social problems by offering training, voluntary roles, apprenticeships and job support makes the landlord role more viable.
- Protecting and enhancing the environment costs through gardening, recycling, allotments brings many social and economic as well as environmental benefits.
- Insulation projects, energy advice etc. not only reduce tenants' costs, but enhance landlord assets and generate new jobs.

These examples show the links between housing management, landlord risks and social needs. The investment in frontline management and face-to-face contact is a pre-requisite for positive housing and community outcomes. We also know that there are many benefits to social landlords from social investments, as many areas of social investment that we have uncovered and described show. However the brief discussion of housing management issues shows how close the relationship is between landlord problems and social problems. Taking Orbit's four strategic priorities for social investment seriously involves more than a project-based approach. Tackling worklessness, financial inclusion, preventing and reducing anti-social behaviour / youth inclusion, empowering independence are close to the heart of the 'Triple Bottom Line' approach. We would add a fifth priority for social, economic and environmental reasons – energy saving and environmental protection. These five strategic priorities are vital to community cohesion and at the same time enhance the viability of housing associations such as Orbit.

Approaches to social investment

If social investment is so important, how can landlords whose main task is housing, not social, provision know they are on the right track? The Young Foundation conducted extensive research into social investment and identified five aspects needed for them to work that closely match the ingredients for success that we identified⁴:

- a. Having the right personality, skills and leadership to secure and sustain the project / programme.
- b. Pursuing a co-operative, inclusive approach to all stakeholders, particularly community members and lower skilled essential workers.
- c. Doing basic market research and project planning to galvanise support and secure base-line inputs.

⁴ Mulgan, Geoff, Neil Reeder, Mhairi Aylott, and Luke Bo'sher. *Social Impact Investment: The Opportunity and Challenge of Social Impact Bonds*. Publication. London: Young Foundation, 2010.

- d. Monitoring and recording outcomes and impacts, both to show added value and to secure continuing funding.
- e. Securing on-going, low-level funds to keep the activity in place when it works.

These conditions offer a clear way of thinking about and planning for social interventions more broadly, although they derive from the Young Foundation's study of Social Impact Bonds and Social Investment. The social interventions will deliver clear social benefits if four key conditions can be met as outlined in Figure 32.

Figure 32: Conditions necessary for social investment to work and produce a social return

Condition	Details
1. Preventative intervention	The intervention is preventative in nature and sufficient funding for the intervention is currently available.
2. Improves well-being in an area of high social need	The intervention improves social well-being and prevents or ameliorates a poor outcome.
3. Evidence of efficacy	The intervention is supported by evidence of its efficacy and impact, giving funders confidence in the scheme's likely success, and promoting high levels of potential saving.
4. Measurable impact	It is possible to measure the impact of the intervention accurately enough to give all parties confidence of the intervention's effect, including <i>a sufficiently large scale, appropriate time scales and impacts</i> that closely relate to the saving and ARE relatively easy to measure.

Note: derived from research by the Young Foundation.

These conditions apply to many of Orbit's social investment programmes.

Figure 33 shows these conditions applied to the Mencap food-training project hosted by Orbit sheltered housing in Stratford (Chapter 7). In this project the kitchen and eating facilities of Orbit's sheltered housing scheme are shared with Mencap in order to pursue training and activity for their members with learning difficulties.

Figure 33: Conditions for social investment applied to Orbit Sheltered Housing Mencap Partnership

Condition	Application to Orbit / Mencap
1. Preventative intervention	Local community centre closures and funding cuts to Mencap facilities left members with learning difficulties without a supportive activity. Orbit provides their sheltered kitchen facilities to support under-occupied members of the community with meaningful work.
2. Improves well-being in an area of high social need	According to the Director of Sheltered Housing, there has been a noticeable increase in residents with learning difficulties. The project responds to this increase and provides those at risk of losing out due to funding cuts with training and activity. Sheltered housing residents also benefit, as their social well-being is improved through increased community activity and the provision of fresh food.
3. Evidence of efficacy	People with learning difficulties are involved in activity and receive practical skills, while residents of supported housing benefit from increased community activities. Orbit provides available facilities and develops a valuable partnership.
4. Measurable impact	Measured by numbers of Mencap members participating in the programme, numbers of sheltered residents enjoying meals. Some revenue is generated by selling meals to the wider community, thus recovering some costs.

Small scale, community-level projects, responding to specific local needs such as this example, are hard to measure, and by definition responsive, reactive and flexible with non-cash and hard-to-pinpoint social benefits. These local community investments are a main focus of resident concerns, prioritised by Orbit's social funding. Our research confirms their value. They often involve partnerships and their benefits are widely dispersed, but both these factors make them hard to measure. This does not detract from the way staff and residents rate them, or from their intrinsic value.

There are some specialist areas of work in Orbit, particularly sheltered and supported housing, where Social Finance and Social Impact Bonds could in future play a role – this relates particularly to preventive health care (keeping people out of hospital). Getting young people into work may also move up the agenda as the costs of not doing so mount, not just in anti-social behaviour but also in long-term employment prospects, family impacts, mental health etc. However there are only limited, and shrinking, funding streams for these beneficial social investments currently. Orbit therefore needs to identify activities where the social return is high enough and the upfront costs low enough to attract investment, while meeting the conditions we have set out. For more information on **possible sources of finance** for developing social and community activity see **Part 6 of Volume III**.

Learning from enterprising investments

Three examples of low-cost, high return housing initiatives are worth considering because they actually produce known social return for relatively modest investment. They are described below:

a. *'Social caretaking' from Northern Italy*

In blocks of elderly flats, the social landlord reserves one (very small) flat for a student or young worker willing to give ten hours a week of free voluntary support in exchange for very cheap rent. These reduce calls on doctors, admissions to hospital, accidents, while greatly improving tenant satisfaction and reducing landlord costs.

b. *'Social Lettings Agency' from Belgium*

The Social Letting Agency based in Brussels and Antwerp aims to find private landlords with poorly maintained empty property, reach a ten-year agreement to do them up to a minimal standard, and let them at cost to tenant members of a Rental Co-operative, and manage them. The Co-operative recruits members from bad rented housing, who are on low incomes and urgently need better, more secure housing with more space for children. The City Council helps with rent supplements (housing benefit) if necessary. The landlords take great pride in getting their properties let at modest rents, upgraded, cared for and no longer empty. The properties revert to the landlord in improved condition after ten years.

c. *Tenant Management Organisations from the UK*

Tenants in council housing, and occasionally private or housing association property, form a member co-operative to take over some or all management functions from the landlord. They use rent income (based on a management agreement) to repair, clean and care for the estate or group of properties. The social landlord monitors implementation of the agreement. Tenants undertake training in necessary skills. Tenant Management Organisations generally outperform the landlord at lower cost.

The idea of Social Return on Investment (SROI) is therefore interesting and useful. It provides a way of forcing government, charities and social enterprises to think through social spending – checking a project's value and assessing its viability. In practice, applying SROI is complicated and requires a cost-benefit analysis along the lines of our peer research model (see Chapter 3). However, social benefits from social investment are so widely recognised that they more than justify Orbit's social programmes.

Orbit as landlord can get a big **social** return on its social investments but any **financial** return is indirect, e.g. better rent arrears record because of credit unions and financial advice; less vandalism and anti-social behaviour because of more youth provision. There are very few funds available through social finance or government programmes. Those that exist apply to specific social needs (e.g. reoffending, children in care, alcohol and drug abuse), where potential cash savings are significant.

Conclusion

Orbit can prioritise strategic issues that carry long-term costs but offer actual payback if tackled in advance of problems mounting. We have identified four but there are others:

- Energy saving to help rent payments and reduce fuel poverty;
- Volunteer training to help elderly and families;
- Job training for residents to create the local community services for people in need and providing a stepping stone to experience and future work;
- Financial advice, building on existing Citizens Advice experience (Rugby) and credit union experience (Bexley).

Residents of Orbit could be more directly involved in Orbit's work, using the project training, volunteering, support and delivery methods we demonstrated in the Peer Research Project. The following activities lend themselves to this approach:

- Supporting elderly people;
- Mentoring young people;
- Befriending schemes;
- Shopping car-shares for rural areas;
- Community cafés in new and existing developments;
- Community gardens in all shapes and sizes to reclaim unused patches of land (see Incredible Edible Todmorden);
- Developing energy advice to implement and apply Orbit's high-level commitment in this important area, using training, volunteering, social contact.

These strands of work potentially produce multiple benefits at low cost. They require Orbit to develop and manage the projects, to 'hand-hold' residents as they take on new and challenging roles, to invest in residential training which is key to developing the task-orientation, basic know-how, confidence and motivation to achieve set goals. Dedicated staff, whose clear role is to support, organise and facilitate agreed activities, need to manage the overall investment, monitor and take preventive responsibility for the programme. With this approach Orbit can carry forward scenario three of our model (Chapter 8) while retaining highly responsive social investment.

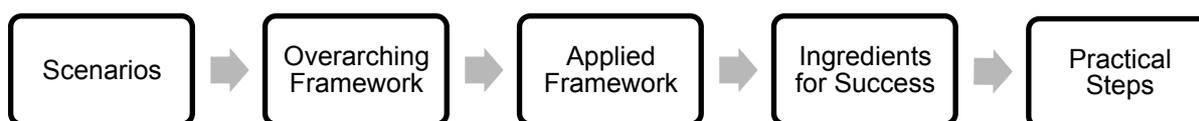
Building on Orbit's landlord role, its social investment priorities, its track record in development and its ambition to innovate as a social entrepreneur, it is possible to construct a framework for future action to meet these priorities. Our final chapter of this section presents the framework and describes how Orbit can apply it.

Chapter Ten: Outline framework for social innovation and community support in Orbit

Overview

Orbit's ground level role in the communities where it operates needs to be embedded within its wider role in an increasingly complex, increasingly urban and increasingly resource-constrained world. Orbit's future social investment must be strongly linked to its housing role as provider and manager. A strong clear framework provides a structure for working out how to channel the creative thinking, the practical responsibilities and the problem-solving imperatives of an organisation from achievable, agreed, ambitious goals to realisable action plans. An agreed framework provides support to staff and board members in systematising their ideas in response to multiple pressures. A clear framework helps communities to understand how Orbit works, under what imperatives, and steered by what sense of purpose and direction. Figure 34 outlines the four components that compose the framework, which are described in detail in the remainder of this chapter.

Figure 34: Outline framework



Overarching social and community investment framework

Three overarching problems make housing associations invaluable to low-income communities:

- Wider economic problems and financial turmoil, which have shaken confidence in both private and public sectors;
- Social tensions around rising inequality, unemployment and youth joblessness which can explode;
- Energy supply and other resource problems that press up against environmental limits.

The four pillars of our over-arching framework respond to these problems. We have identified four main pillars that seem crucial to Orbit's overall prospects in Figure 35. Each of the four pillars of this overarching framework is central to developing a fine-grained, applied framework for social investment.

Figure 35: Four pillars of an overarching social investment framework

Social, economic and environmental imperatives	Strategic priorities	Practical constraints	Resources
<ul style="list-style-type: none"> • Orbit must operate within much wider & deeper challenges facing European housing providers • The 'Triple Bottom Line' is key to working within social, economic & environmental limits. 	<ul style="list-style-type: none"> • Working within the current policy context • Sustaining Orbit's ethical & social purpose • Retaining financial viability • Meeting environmental targets • Building community resilience 	<ul style="list-style-type: none"> • Direct & local responsibilities • Social landlord role • Neighbourhood conditions • Community needs 	<ul style="list-style-type: none"> • Environmental limits • Energy & other resource costs • Reductions in funding • New opportunities & challenges • Scope for alternative action

1. **The social, economic and environmental imperatives** come under Pillar One because they are **not** interchangeable but **utterly interdependent** and therefore provide in themselves a framework for developing action on the ground. We cannot trade environmental threats for economic potential because in the long run, the one entirely depends on the other. For example our natural resources, our environmental systems and services underpin our economy as the government's white paper on UK eco-systems explains.⁵ The pressure of adequate energy supplies – oil, gas, nuclear, renewables – shows this interdependence. The social imperatives similarly link to economic progress, prosperity and the environment we live in. For example gross inequality eventually undermines human well-being as a whole, while reducing economic benefits.⁶

Many internationally renowned writers have explored this interplay – Nicholas Stern⁷, Jared Diamond⁸, E. O. Wilson⁹, F. Schumacher¹⁰. All political parties signed up to this 'three-legged pillar' of sustainable development, first set in Rio, 1991, and restated by the current coalition, following New Labour's Sustainable Development strategy of 2005.¹¹ Orbit's decision-making must be underpinned by that life-supporting pillar. This presents a significant challenge to conventional housing providers.

⁵ DEFRA (2011) *The Natural Choice: securing the value of Nature*. London: TSO

⁶ Wilkinson, R. & Pickett, K (2009) *The Spirit Level*. London: Allen Lane

⁷ Stern, N (2012) *Climate Change and the New Industrial Revolution*. Lionel Robbins Memorial Lectures 21-23 February

⁸ Diamond, J (2005) *Collapse: how societies choose to fail or succeed*. New York: Viking

⁹ Wilson, E. O. (2002) *The Future of Life*. Alfred A. Knopf New York

¹⁰ Schumacher, E. F. (1973) *Small is beautiful: a study of economics as if people mattered*. London: Blond and Briggs

¹¹ DEFRA (2005) *Securing the Future delivering UK sustainable development strategy*. London: HMSO

2. **The strategic priorities** shaping Orbit's work form the second pillar. How can Orbit flourish and its services meet acute need in a situation of intense cutbacks in funding within the framework of sustainability set out under pillar one? A credit crunch, a double-dip recession, rising youth unemployment, radical changes to welfare and weak house building all impact Orbit's core business. Orbit cannot defy, escape or hide from these pressures. But its social mission and ethical principles underpin its responses. These will help Orbit find its way through the sea of changes and bad news that hit the headlines.

Social landlords like Orbit are 'anchors in the storm'. A grounded and viable organisation is more valuable than new initiatives carrying high risks. Within these constraints, Orbit has room to innovate, to focus on social advancement in enterprising and path-breaking ways, 'providing the fishing rod rather than the fish'. Given the pressures of inequality, the harsh impact of cuts, and the potential risks to Orbit of current policies, community resilience to create more self-reliance has become a **high** strategic priority.

3. **Practical constraints and responsibilities.** Pillar Three combines the landlord function with community needs. Owning property and renting it out to families, the elderly and the young in many different communities and types of area carry heavy, day-to-day and long-term responsibilities. These can be burdensome and relentless, but they offer a rich opportunity for interaction with people. It is difficult to function as an effective landlord without getting involved in community conditions. The practical landlord role opens the door to innovative, cost-effective and grounded community interventions that support Orbit's neighbourhood focus. It is the practical landlord role that brings together housing and social priorities.
4. **Resources.** Pillar Four shapes and defines Orbit's potential to act. In practice there are both huge resource challenges, referred to in Pillar One on a global and national scale, and also significant resource potential as a large social landlord. Orbit has a valuable asset base: a strong rent stream, a community base in up to a third of all local authorities, a social and physical infrastructure that provides many vital services, many neighbourhood bases, and impressive partnerships, expanding the effectiveness of its resource base. It also has large and lively staff teams, keen to do more, as the World Café experience shows; and tenants who, with support and expanded training opportunities, can deliver practical help within communities, as our research project shows. Orbit should continue to draw on these invaluable resources and work to strengthen its relationships both internally and externally.

Taken together, the four pillars of an over-arching framework point to the central role that Orbit can play as champion of sustainability, of local initiative, and of leading social housing deliverer. This overarching framework, with its four pillars supporting Orbit's vital strategic role in current times, shapes the applied framework that we have developed to help Orbit think through and plan its social interventions and its actions in support of communities and tenants.

Applied social and community investment framework

A sustainable framework for community interventions and social support is important for several reasons:

- Firstly the current rather ad hoc, responsive approach, **with multiple, distinct projects scattered across three regions**, seems unsystematic to staff, insufficiently targeted and not always followed through. This approach offers many advantages as we show, but in our scenarios chapter we argue that a more comprehensive 'Triple Bottom Line' approach could build on Orbit's strengths.
- Secondly, Orbit invests significant resources in small grants, but it is unclear **what return it should get to match the inputs**. The current approach would deliver more within a clearer framework.
- Thirdly Orbit's own **strategic priorities for social investment – financial inclusion, work and skills, well-being and community – do not translate directly into action on the ground** and are not widely recognised or flagged up at ground level.
- Fourthly the **severe resource constraints facing Orbit** in the future are mirrored by serious cut backs in welfare benefits, public services and job opportunities for Orbit's tenants and the communities in which its homes are located. Therefore **social need is growing while resources are shrinking**.

These four factors combine to make the **social** role of a **social** enterprise both more vital and more challenging. The money will be harder to find and therefore must go further, so the enterprise role must also come to the fore. The applied framework we propose is not a magic bullet. Community progress depends on a **long-term, steady commitment, clear priorities, on-going support** and **local ability to respond** to need.

There are six strands of the applied framework, each of which has several vital components that must be understood. They derive from the ingredients for successful projects that we have identified in this study. The applied framework explained below helps managers assess project ideas and support their development. Ground-level staff will work within this framework, and will use the ingredients for success set out earlier to shape projects as they are implemented. We set out in each strand in Figure 36.

Figure 36: Six strands of the applied framework

Entrepreneurial flair	<ul style="list-style-type: none"> • Innovation in partnerships • Potential ripple effect of pilot projects
Sticking to the knitting	<ul style="list-style-type: none"> • Regular, low-level, sustainable funds • Steady structures • Getting basics right
On-going face-to-face support	<ul style="list-style-type: none"> • Creating community links • Clear, simple communication
Training and job potential	<ul style="list-style-type: none"> • Volunteering • Level 1 training • Using the National Communities Resource Centre
Payback	<ul style="list-style-type: none"> • Measuring impact • Timelines • Costs / savings • Clear monitoring • External help
Local sustainable development	<ul style="list-style-type: none"> • Integrating environmental, social, economic imperatives on the ground • Fitting the local with the global priorities

Below are brief explanations of what each strand signifies in relation to Orbit's work.

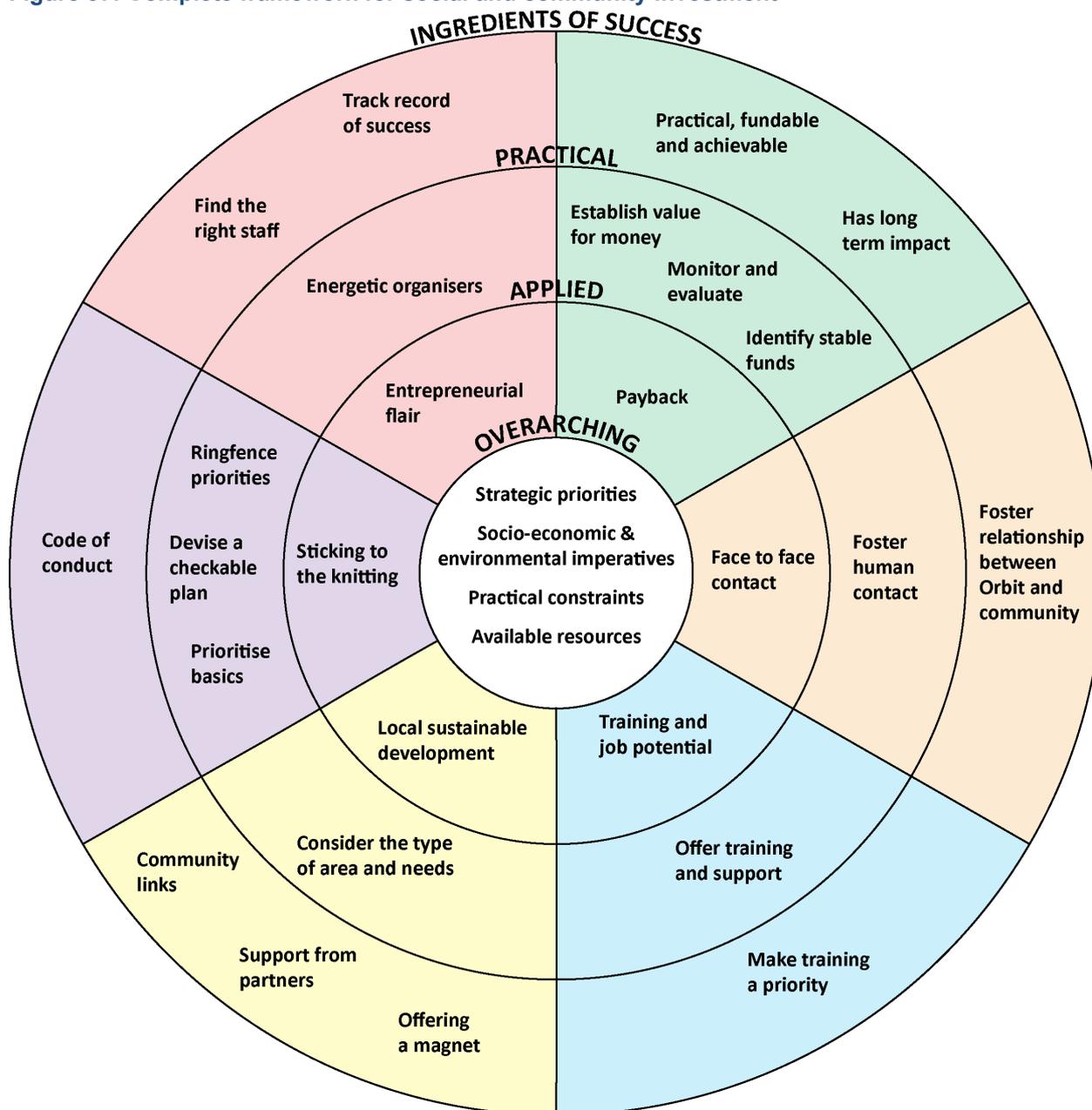
1. **Entrepreneurial flair** implies strong leadership internally, willingness to innovate and use of external expertise. Enterprise is needed to develop residential training for specific projects with potential to help Orbit, on the lines of the peer research; for example persuading neighbours to adopt Green Deal and ECO offers for energy saving. The financial inclusion team in Bexley is working with the Credit Union on ways to orient tenants' savings towards covering rents and avoiding arrears.
2. **Sticking to the knitting** means that ideas and actions should be manageable and sustainable. Orbit must identify sufficient resources (space, staff, cash, partners) to deliver projects competently **and** with flair. This implies a practical approach using in-house know-how and common sense.
3. **On-going, face-to-face support** follows on from 'knitting'. It is hard to get this right, but model landlords historically have direct, positive relations with tenants, providing a strong payback in landlord performance and costs. This applies to social as well as housing problems and challenges.
4. **Training and job potential**. There is scope and capacity for more structured volunteering in Orbit's work. This is NOT cost free, but it offers opportunities for follow-on work, for developing pathways into careers, for creating new community resources, resilience and for long-term payback.
5. **Payback**. Social investment rarely produces a monetary return, but it can and should bring many non-cash benefits to Orbit, its residents, the wider community and society as a whole. It is important to recognise these through transparent, simple monitoring and reporting.
6. **Local sustainable development**. Overarching threats, risks and challenges cannot be solved locally. But they require many local actions to buttress new ways forward. With rare exceptions, bigger problems are cumulative, linking many smaller problems, which play out in communities. They require many small coherent investments. Making and keeping low-income neighbourhoods viable is key to wider environmental protection, social survival and economic progress.

The applied framework fits with Orbit's strategic social priorities:

- Financial inclusion
- Training, skills, jobs
- Well-being and care
- Children and young people / community support

There is a flow from the overarching to applied frameworks, to ingredients for success and practical steps. Our aim in setting out our framework in these layers is to help senior staff filter down their investment decisions to ground level, and allow frontline staff who deliver projects to see both what they actually need to do, and trace the threads between ground level realities and high-level decisions. Figure 37 shows how the overarching framework fits with the applied framework and how these fit and inform the ingredients for successful projects and practical steps that need to be taken up by frontline staff to maximise the potential of Orbit's community investment.

Figure 37: Complete framework for social and community investment



Ingredients for success and practical frontline steps

The ingredients for success, that we developed from Orbit’s beacon community projects and from wider evidence, offer practical guidance to action on how the framework can be implemented. To help staff apply the framework we have explained practical steps that need to be taken to apply the ingredients for success within the framework. These are set out in Figure 38.

Figure 38: Practical frontline steps for community investment

1. The **type of area and concentration of Orbit property** shapes activity and this will vary place by place.
 - Identify and actively cultivate relevant local partners
 - Uncover potential volunteers
 - Constantly revisit local needs
 - Have simple, responsive, accessible methods
2. **Staff** require certain **qualities and time** to sustain initiatives:
 - 'Personality' and drive
 - Responsive approach
 - Strong community orientation
 - Clear communication channel
3. **Innovative** approaches must be **coupled with tackling the basics** – a hard combination
 - Each team needs someone to sell ideas who is also someone who can make things happen
4. **Long-term funding** potential is crucial to the viability of projects:
 - Revenue saving / generating activities, e.g. credit unions
 - Few 'generous' programmes – government cuts, charities under pressure
 - Orbit's own resources far outstrip external sources
 - Therefore wider Orbit support
5. Grounded activity engenders **human contact** and this of itself helps communities.
 - Personal, face-to-face – both housing work and community support
 - Community get-together spaces and activities
 - Realistic, durable, fundable plans, often 'traditional' ideas
6. **Training and support** is transforming if done cleverly to make Level One achievements credible. The peer research experience at Trafford Hall was invaluable in demonstrating this.
7. **Value for money** is critical:
 - Social return can be high
 - Continuous support is essential
 - Costs need to be low
 - External monitoring helps
8. **'Ring fence' priorities** and give them high profile:
 - Training, jobs
 - Financial inclusion
 - Networking / cohesions
 - Anti-social behaviour and young people
 - Community activities
9. A **plan this is checkable** by other people and market research that shows there will be a big enough take-up.
10. **Monitoring and evaluation** is difficult with highly dispersed approach. It needs closer study, and an external, once-removed method (see priorities). Feedback mechanisms that keep tabs on the project's social impacts, through a work diary for example. Regular visits by managerial staff, to receive updates and assess the progress of the project.

Conclusion

Orbit responds to the external environment and the internal needs of the organisation. These pressures are shifting rapidly, reducing Orbit's room for manoeuvre while encouraging independent, innovative approaches to problem-solving. By linking together the wider priorities and pressures with very local needs and problems, we can spell out:

- The scenarios facing Orbit;
- The limits and potential of social investment;
- The overarching framework within which Orbit needs to operate;
- The applied framework that can shape ground-level action;
- The key ingredients and practical steps that Orbit staff need to work within and receive training and support to make a real difference and deliver real community benefits, while helping Orbit maximise the **social** return on its investments.

Part 5: Recommendations

Chapter Eleven: Where next?

Priorities for action

So what should Orbit do to enhance its social investment and to create maximum impact? We have identified six leading priorities:

- 1) Create a **small social investment resource within the policy and research team** at the centre to:
 - Identify new sources of relevant and new policy ideas;
 - Co-ordinate major bids;
 - Develop the high-quality training for volunteering models;
 - Provide know-how, support and advice to staff and community groups;
 - Identify new partnerships to enhance financial and other resources;
 - Document learning outcomes and impacts, to show a social payback when set against costs.

This function should complement and enhance the work of Orbit's federated group boards.
- 2) Recruit **team-based social enterprise organisers**. These roles may exist already and would simply re-frame positions, to provide on-going organisational back-up, business planning, vetting, training, recruitment, 'hand-holding' follow-through. Implementing projects requires this dedicated support; promoting 'bright ideas' and success stories needs someone once removed from the immediate tasks.
- 3) Expand **face-to-face ground-level staff contact with residents**. For example introducing Brompton bikes (which fold up and fit in cars) would make staff more visible and give them more openings for informal encounters. Our researcher did this with considerable success.
- 4) Adopt a **systematic, personalised, and thought-through approach to recruiting residents into responsible voluntary roles**. This could apply particularly to the Green Deal, elderly care, youth mentoring, family support, financial advice. Local authorities may be interested in this partnering approach.
- 5) Offer more **consistent staff training across the board** in the areas that are Orbit's strategic priorities:
 - Financial inclusion;
 - Training and access to work;
 - Community well-being and social care;
 - Children, young people and community support;
 - Community organising.

6) Make **energy saving a central priority** in the light of:

- Orbit's record and experience;
- Potential funding from energy companies, Green Deal and other;
- Community buy-in;
- Wider priorities and threats.

How Orbit can implement the framework

Orbit's neighbourhood basis

Maximising the use of Orbit's physical assets within communities will greatly enhance its contribution to community development at minimal, or even virtually no extra cost. Meeting rooms, kitchens, office spaces, vacant flats and green spaces can all serve multiple types of community activity and can be used for many very different functions. We came across several multi-purpose facilities, and also saw staff using office space, sheltered housing and local leftover land for community purposes.

Frontline presence

A consistent and reliable Orbit presence will be more important than ever as residents deal with an onslaught of financial pressures and changes. A strong supporting partner can often help in this. Orbit needs to enhance face-to-face ground-level contact without seriously adding to costs. The bright ideas staff outlined in Chapter 5 suggest many ways of connecting with residents. LSE researchers learnt that cycling around the estates we visited generated lots of new contact with residents. Orbit need special strategies for its scattered and hard-to-manage stock. Adding more scattered stocks may not be practical, in light of Orbit's limitations and existing spread.

Supporting partners

The importance of partner organisations was highlighted by every staff member we spoke to. However, many of these organisations are undergoing funding cuts and will be forced to reduce or even withdraw services. Orbit can support more directly useful current work; for example with training, Orbit can identify partners that are most closely aligned with the Orbit purpose and find ways to work more closely with them.

Green agenda

The green agenda opens up many opportunities for Orbit as it ties together its primary roles as a landlord, developer and community investor. Energy saving is becoming more and more prominent as a vital step in producing social as well as environmental gains. Governments are committed to it and residents can buy into it if they understand and feel the benefits. Orbit should make energy saving a central priority and build on its already strong track record to become a beacon in a field which can only grow in importance in the next decade.

Orbit's successful investments in green technologies and energy saving should inform rapid progress in this:

- Group-wide adoption of ambitious energy efficiency goals with a core policy drive from the central team, in order to maximise inputs and benefits;
- Development of a peer adviser training programme to pioneer the role of 'green champions' in Orbit's communities;
- Enhanced partnerships with major energy companies to expand the existing work.

Orbit should develop stronger communication strategies to promote its green investment.

Level of investment in social and community support

Housing associations generally **set aside a proportion of their revenue for social investment**. Orbit dedicates around 1% of its revenue (estimate only). If it raised this to 2% it would produce positive and much wider, more strategic benefits. To achieve this it would need to prioritise strategic issues that carry long-term costs but offer long-term payback if tackled in advance of problems mounting. We have identified four but there are others:

- Energy saving to help rent payments and reduce fuel poverty;
- Volunteer training to help elderly and families;
- Job training for residents to create the local community services for people in need, providing a stepping stone to experience and future work;
- Financial advice, building on existing Citizens Advice experience (Rugby) and Credit Union experience (Bexley).

We believe that the higher level of investment, a very small share of Orbit's overall budget, would actually pay for itself in averting future problems.

Bigger opportunities

Orbit has many advantages it can use in the current climate. **First as a social landlord**, it manages thousands of rented properties at affordable rents. **Renting** is on the increase, but not on the old 'social' model, rather on a cost-recovery model. However, for renting to work long term, quality, quantity, cost, affordability and sound management are pre-requisites – know-how that Orbit has. Renting of all kinds – high- and low-cost – requires close liaison with tenants, careful provision of collective services, maintenance of communal spaces and other socially-based skills. Orbit has this social and management expertise, offering real potential for growth.

Secondly, the **existing housing stock** in this country (private and social) will still provide 70% or more of all homes in 2050, and over 85% of homes already built will still be in use in 2050. Therefore **energy saving**, upgrading and renewal efforts need to focus primarily on existing homes. This is a huge, potentially cost saving opportunity for Orbit.

Thirdly, Orbit's multiple neighbourhood bases serving tenants who need its services and support offer a potential laboratory of learning for social innovation, particularly in developing tenants' capacity and creating new models of change, based on experience. These bases also provide Orbit with a strong foothold in many important areas where that presence can offer multiple benefits to vulnerable communities – a real 'Triple Bottom Line'.

Conclusions

Based on our qualitative research in three case study communities, our successful use of resident peer researchers, and extensive analysis and synthesis of findings from residents, staff, community leaders and external sources we conclude that:

- The frameworks we have devised should be applied to decisions about social investment, using the ingredients of success and practical steps we identified, to help staff implement these priorities and recommendations.
- The framework should be implemented using the strategies outlined above – exploiting Orbit's neighbourhood bases, deepening frontline presence, supporting partners, advancing the green agenda, and securing levels of investment in social and community support.
- We recommend that Orbit adopts a 'Triple Bottom Line' approach as outlined in our scenario three.

The biggest problems facing social landlords are that they do not have a strong enough social focus to win wide public support; nor are they strong enough, unlike big developers, to win consistent government support. They are also not focused strongly enough on their existing stock and their direct landlord roles. They are therefore not strongly enough defended by voters. Can they reconcile the seemingly conflicting pressures of private funding, development cost, social needs and resource constraints?

This research shows that **a clear social focus** within an **enterprising organisation** like Orbit can pay dividends to communities, to the reputation of housing associations and to society as a whole.

Part 6: Appendices

Appendix 1. Orbit's official community investment strategy

This section supplements our introduction to Orbit and gives a brief background on Orbit's community investment strategy.

In 2008 Orbit reviewed its five-year plan and began to focus more strongly on improving services to **customers** and improving the **places** where residents live. An agenda was adopted to deliver services to engage with the communities in which Orbit holds property and to support the life chances of residents. The *Customer First* strategy was launched in 2010, which aimed to put residents at the heart of Orbit's work. As part of this strategy, new forms of tenant involvement were developed that gave residents the ability to influence housing-related policies, scrutinise performance and give feedback on service delivery. These mechanisms included:

- Street and block voices;
- Focus groups;
- Scrutiny panels;
- Tenant and resident associations.

Services days in the community were designed to promote neighbourhood and community cohesion, local Orbit offices were encouraged to draw up neighbourhood agreements and provide local offers to communities with particular needs. More recently the strategic priorities around community investment have focused on:

- Worklessness;
- Financial inclusion;
- Tackling anti-social behaviour.

In 2010/2011 Orbit Group dedicated £382,800 to community investment. The nature of Orbit's current community provision is further investigated in **chapter seven** of this volume.

Appendix 2. Big Society overview

Orbit's vision is being considered within the overarching framework of the "Big Society". The aim of the Big Society is to engage citizens in a way that encourages local democratic participation while responding to local need. The Big Society was introduced by David Cameron in 2010 and the framework is set out by the Cabinet Office¹² as:

- **Community empowerment:** *giving local councils and neighbourhoods more power to take decisions and shape their area. Planning reforms led by DCLG will replace the old top-down planning system with real power for neighbourhoods to decide the future of their area.*
- **Opening up public services:** *public service reforms will enable charities, social enterprises, private companies and employee-owned co-operatives to compete to offer people high quality services. The welfare to work programme, led by the Department for Work and Pensions will enable a wide range of organisations to help get Britain off welfare and into work.*
- **Social action:** *encouraging and enabling people to play a more active part in society. National Citizen Service, Community Organisers and Community First will encourage people to get involved in their communities.*

Another formulation of the overall enterprise, focusing on the transfer of power, is set out by DCLG,¹³:

The Government is committed to a radical shift of power from Westminster to local people. Localised decision-making will become a normal part of everyday life, giving people more say, choice and ownership of their local facilities and services.... Individuals, families, local communities and particularly neighbourhoods, the building blocks of localism, will be re-energised and empowered, and innovation and ideas will flow from local people and enterprises.

This vision is further articulated in DCLG's *Decentralisation and the Localism Bill: an essential guide*¹⁴. Nick Clegg's introduction states:

Radical decentralisation means... giving local people the powers and funding to deliver what they want for their communities – with a particular determination to help those who need it most... [We] know that dispersing power is the way to improve our public services and get the better schools and safer hospitals we want. Democratic engagement, choice, transparency and diversity will not just make the country more liberal, fairer and more decentralised: they will also help develop the world-class public services people want

Six key elements of action to deliver localism are then set out in the DCLG's guide, many of which are being taken forward by the provisions of the Localism Bill (see Figure 39). It is not yet clear how the Localism Act will play out in the 100 local authorities Orbit works with. What is certain is that a more divisive, complex and for now less predictable landscape will emerge.

¹² 'Big Society overview', Cabinet Office. Available at <http://www.cabinetoffice.gov.uk/content/big-society-overview> [accessed 21.11.12]

¹³ : DCLG (2010a) *Structural Reform Plan 2010* DCLG, London. Available at: <https://www.gov.uk/government/publications/dclg-structural-reform-plan> (accessed 21/1/12)

¹⁴ DCLG (2010) *Decentralisation and the Localism Bill: an essential guide*. London: DCLG

Figure 39: Six key elements of the Localism Bill¹⁵

Action 1: Lift the burden of bureaucracy	The first thing that government should do is to stop stopping people from building the Big Society
Action 2: Empower communities to do things their way	Getting out of the way is not enough, government must get behind the right of every community to take action
Action 3: Increase local control of public finance	Government must will the means, as well as the ends, of community power
Action 4: Diversify the supply of public services	Local control over local spending requires a choice of public service providers
Action 5: Open up government to public scrutiny	Public service providers should be subject to transparency not bureaucracy
Action 6: Strengthen accountability to local people	Public services shouldn't just be open to scrutiny, but also subject to the individual and collective choices of active citizens

¹⁵ DCLG (2010): *Decentralisation and the Localism Bill: an essential guide*. DCLG, London. Available at: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/5951/1793908.pdf (accessed 22/11/12)

Appendix 3. Sample questionnaire

The questionnaire was piloted in February 2012 and amended following feedback from Orbit staff and residents. This was used as the basis for the semi-structured interviews with 120 Orbit residents across three geographic areas.

QUESTIONNAIRE

Orbit South / East / Heart of England wants to find out what kind of community projects would make the most difference to you and what more you want from them as your landlord. This questionnaire is completely **anonymous** – we will not attach any information about you to our report.

Background and Introduction								
Name			Address					
Area type (please circle)		Dense urban	Outer / suburban	Fringe	Town	Village	Scattered rural	
Tenancy Start Date:		Age: <30/ 31-45/ 46-60/ >60			House/ Flat			
Family Structure:								
Employment/Benefits:								
Disabilities:								

Section 1: About your family
a) How long have you lived here?
b) How long have you been an Orbit tenant?
c) Can I confirm how many people are there in your family / household?
d) How are they related to you?
e) What kind of jobs do people in your family do? <i>[or if not working are they looking for work/in training or education]</i>
f) Do you have a computer at home? If so do you use the internet / email / social media (e.g. facebook / twitter) If not, do you think this will change soon? Why / why not? Do you use a computer anywhere else?

Section 2: About where you live.							
a) What do you think about your <u>housing</u> ?					<i>Why do you feel it is....?</i>		
Excellent	Good	OK	Bad	Terrible			
b) What do you think about your <u>local area in general</u> ?					<i>Why do you feel it is...?</i>		
Excellent	Good	OK	Bad	Terrible			
c) SHOW: Please tick the words that you think tell me what the area is like .							
Clean	Safe	Friendly	Welcoming	Lively / Active	Quiet	Attractive	
<i>Neither clean nor dirty</i>	<i>Neither safe nor unsafe</i>	<i>Neither friendly nor unfriendly</i>	<i>Neither welcoming nor hostile</i>	<i>Neither lively / active nor dull / boring</i>	<i>Neither quiet nor noisy</i>	<i>Neither attractive nor unattractive</i>	
Dirty	Unsafe	Unfriendly	Hostile	Dull / Boring	Noisy	Unattractive	
Is the area...							
Good for families / elderly		Good for the elderly		Good local transport			
Bad for families / elderly		Bad		Bad local transport			
Neither good nor bad for families / elderly		Neither		Neither good nor bad local transport			
d) What do you think are the best things , and the worst things , about living in this area?							
e) Is the area improving or getting worse and why?							
f) Do you think there is a good community spirit in the area? [<i>If yes, in what way; if no, why not?</i>]							
g) SHOW: What local services / facilities do you or your family use regularly? Please tick all that apply							
School/nursery	After school clubs	Surestart	Adult education	Holiday play schemes	Youth clubs	Lunch clubs/ coffee mornings	Pensioners clubs
Local Library	Community Centre	Park / Playground	Swimming Pool	Gym/ fitness /sports	Doctors/ health centre	Pub/Café	Church/ Choir
Recycling centre	Citizens Advice or money advice	Council local office	Elderly care and support	Tenant/ resident association	Other:		
Which of these services and facilities do you find most useful and why? [NOTE: <i>in particular do they work well because they are: well used, well run, popular, they help people, they bring people together, the staff are friendly, or other reasons</i>]							
Have you noticed any changes in these services recently? [<i>question about possible impact of cuts; but also about possible improvements recently</i>]							
g) Do you go to any local community events? <i>e.g. summer fair, festival, children's days out, Christmas party, other parties, school events etc.</i>							

Section 3: Community Initiatives that matter to you

a) **SHOW:** Please have a look at this list of community initiatives. Which of these do you think be useful to you? [NOTE: some may already have been covered].

Employment / education / skills

- Job clubs/job training
- Traineeships / apprenticeships
- DIY skills workshops
- Skill swapping scheme
- Adult Education
- Arts and crafts

Financial

- Money advice
- Help to reduce fuel costs
- Credit unions
- Savings club

Environmental

- Energy saving packages
- Tree planting

Crime / anti-social behaviour

- Crime Watch
- More to tackle anti-social behaviour

Families / young people

- Youth clubs – age bands
- School holiday programmes
- After school clubs
- Family events
- Parenting programmes

Older People

- Older people's garden assistance
- Older people's social clubs – lunch, tea, bingo, keep active

Community-based activities / facilities

- Community barbeques
- Community gardens, allotments, food growing
- Swaps / clothes exchange / nearly new sales / cake sales
- Community café
- Community shop
- Walking groups
- Choirs

What problems would you tackle first if you were in charge? List up to three priorities or number them starting with the most important (*where 1 is most important*).

Crime and anti-social behaviour	Education	Play spaces for smaller children	Clubs and things for adolescents	Help people into jobs	Services for older people
Open spaces/sports and leisure	Better buses / transport	Different/ better shops	Better housing	Money advice and debt advice	Other (please list)

b) How well does your **local authority** run services in this area (refer to Q2g)? Well/ not too bad/ poor

c) What do you think the local authority's priorities should be?

d) If the local authority could protect 3 services, which should they be?

Section 4: Role of Orbit

a) **SHOW:** Orbit runs a variety of projects both here and in its other areas. These are projects which **go beyond their traditional role as landlord** but which are intended to help tenants. Please have a look at the list of projects below.

Employment / education / skills

- Activities for young people that lead to qualifications
- Local apprenticeship schemes
- Local work club
- Support residents into training and work opportunities
- Help with writing CVs and preparing for job interviews
- Local social enterprises and helping community enterprises get established

Financial

- Welfare benefits and money advice services
- Credit unions
- Savings schemes

Health / well-being / lifestyle

- A women's health and well-being project
- Cookery classes
- Sports coaching and local sports teams

Open spaces / local environment

- Local gardening and green space maintenance
- A community orchard

Community activities

- Community safety projects
- Local drama and music events
- Organising community events and activities
- Youth clubs

Digital inclusion

- Community internet access in rural areas
- Local community website and training residents in using social media
- Training older people in using computers

Which of these might be useful to you and your family?

Any other projects or services which you would like to see provided?

Did you know that Orbit ran projects such as those listed above?

Do you know about similar programmes / projects run by others? [NOTE: explore what and who]

Do you think it would be a good thing if Orbit did extra things of this kind? [NOTE: explore why/ why not]

b) What do you think of Orbit as a landlord?

Excellent	Good	OK	Bad	Terrible

For additional comments:

c) What do you think about how they manage their housing?

Excellent	Good	OK	Bad	Terrible

For additional comments:

d) What about repairs?

Excellent	Good	OK	Bad	Terrible

For additional comments:

Section 5. Voluntary activity and involvement

a) Do you have much contact with neighbours?

b) Do you do any voluntary work? (Formally or informally) Give any examples.

SHOW/PROMPT: Do you do any of the following?

- Helping your neighbours
- Being a Block Voice representative
- Helping at school events
- Helping with a lunch club
- Helping at church or community events
- Looking after people who are sick or elderly
- Teaching a useful skill e.g. cookery, arts and crafts, DIY etc.
- Giving clothes to charity shops
- Helping with raffles of fundraising
- Helping with a homework club or another type of organised club
- Working in a charity shop
- Looking after your neighbours' children
- Looking out for your neighbours
- Being part of a pressure group
- Being part of sports club committee / coaching or organising events
- Helping with gardening or tidying up the area
- Getting more involved in the running of Orbit

c) **If yes**, what do you get out of this voluntary work?
(**if no**, would you like to? Is there anything that stops you?)

d) Do you know other people who volunteer or help out? What do they do?

Observations

	Excellent	Good	OK	Bad	Terrible
Housing conditions					
Block conditions					
Street conditions					
Estate conditions					
Other comments on conditions					

How did interview go?

Well	Easy	Flowing	OK	Often needed prompts	Difficult	Hard	Didn't learn much
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Any especially useful comments or ideas?

Other observations

Appendix 4. List of staff and community leaders interviewed

Staff Title	Number interviewed
Estate Surveyors	2
Grounds Managers	2
Community Housing Officers/ Neighbourhood Officers	8
Financial Inclusion Manager	1
Tenancy Support Workers	2
Resident Engagement Officer	1
Community Investment Officer	1
Community Investment Manager	1
Supported Housing Officer	1
Caretakers	2
Income Recovery Officers	2
Neighbourhood Mangers	2
Sustainable Investment Officer	1
Head of Community Sustainability	1
Director of Neighbourhood Services	1
Head of Income	1
Regeneration Project Co- coordinator	1
Community Project Worker	1
Service Improvement Officer	1
Total:	32

Community Leader Title	Number interviewed
Children's centre managers	2
Local art group member	1
Parish councillors	2
Vicar	1
Residents association members	2
Girl Guide coordinator	1
Community allotment coordinator	1
Citizens Advice officers	1
Council community officers	2
Re-decorating social entrepreneur	1
Community centre volunteer	1
Crime prevention partnership	1
Youth club project leader	1
Local activist in crime prevention and youth	1
Total:	18

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