



Housing and  
Communities



## **Bigger than Business:**

Housing associations and  
community investment in  
an age of austerity

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Volume I

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## Acknowledgments

Many thanks to Christoph Sinn and Simon Graham for the support throughout the project, and to the Orbit team that advised the research group from the outset. Special thanks go to Rachel Newton, Liz Richardson and the National Communities Resource Centre at Trafford Hall for helping LSE Housing and Communities develop the peer research and training method. Many Orbit staff in the South, East and Midlands hosted our visits, opened doors and answered countless questions and we owe thanks to them all. A particular thank you to all the residents who gave their time to the development of this research, especially the six peer researchers – Marilyn, David, Karen, Belinda, Michelle, John – who donated countless hours in the hope of making their communities a better place to live. We would also like to thank Senior Orbit managers, Paul Tennant, Boris Worrall, Vivien Knibbs and Stewart Fergusson, and Orbit Chair, Liz Potter, for meeting with us to explain Orbit's work, priorities and ambitions. Special thanks to Isobel Esberger and Katie Bates, who helped with preparing the report and analysing findings.

### Note:

Bigger than Business 'Summary', and Volume II (extended research report) and Volume III (supplementary information) are available on the LSE Housing and Communities, and Orbit websites at:

**[<http://sticerd.lse.ac.uk/LSEhousing/> ; [www.orbit.org.uk](http://www.orbit.org.uk)]**

## 1. Introduction - a brief overview of the Big Society Project

Housing associations under the Coalition Government face a double responsibility: to develop their non-profit housing activities with much reduced grants; and to help their tenants cope with major reform of welfare support and increasing restrictions on housing benefit. At the same time, the idea of volunteering within communities has gained currency as housing associations struggle to expand their community support role with shrinking resources. This echoes in a practical way the lofty aims of the 'Big Society'.

Orbit, a large, well-established and widespread social landlord, wants to meet these challenges head on. It commissioned five short think pieces on the economy, political environment and localism; social policy; housing market; environmental and energy issues; and consumers, choice and competition. These think pieces<sup>1</sup> provide the backdrop to a new vision and business plan to 2020 which Orbit will adopt in a new climate of **shrinking resources, greater need** and more **intense social problems**. In order to maximise the help Orbit provides in the communities where it is a social landlord, it asked LSE Housing and Communities to develop a framework for social and community investment, based on talking directly to Orbit tenants and visiting community investment projects in its three regions.

*Bigger than Business* summarises the findings from LSE Housing and Communities' research, explains how it was carried out, and what conclusions it came to. It sets out three possible scenarios for Orbit and other associations facing similar challenges; and proposes an overarching framework for future decision-making, with an applied framework to help Orbit staff on the ground make decisions about how and where to invest in communities, and what practical steps are necessary for success. This work became Orbit's 'Big Society Project' because it pulled together ideas from many individual tenants, staff and community projects into a framework that offers big gains for the housing association world. It shows that housing associations provide a vital anchor in communities and tenants not only value their role, but can themselves make a major contribution.

Large, developing housing associations face four big challenges. The **first** is how to maintain frontline services in housing management while streamlining management operations to reduce costs and retain viability in the face of funding cuts. **A second challenge** is to meet the needs of low-income tenants living in low-cost social rented homes under the cumulative impact of cuts, housing and welfare reform. **A third** fundamental challenge is the rising cost of energy and other commodities, such as food and building materials, due to resource pressures. These rising costs directly affect the poorest communities, making it increasingly important to find new ways of managing and doing things to save resources. **The fourth challenge** is to work out how social landlords can help create more viable, more economically active, more productive communities, while helping the neediest groups in society.

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

## 2. About Orbit

Orbit is a large, not-for-profit housing association, set up in 1966 and growing since then as a social landlord to provide 37,000 low-cost rented and shared ownership homes in over one hundred local authority areas. Its Group office is in Coventry, where services such as core financial, IT, policy and research resources are centred amongst other locations with regional offices in Bexley, South London; Norwich, East Anglia; and Stratford-upon-Avon, Warwickshire. Its housing stock ranges from high density, transferred council estates, to purpose-built clusters of new homes on mixed tenure estates, to scattered rural properties. It has many sheltered and supported housing schemes and a quarter of Orbit's tenants are over sixty.

Orbit provides many different services to the communities where it works:

- housing management and maintenance services to all its tenants;
- social and community investment through numerous neighbourhood-level projects;
- provision of specialist support services to residents needing care;
- high-level backup services to all its regional offices and specialist services;
- development of new homes, both for social renting and for sale. All proceeds from sales are ploughed back into Orbit's core, non-profit activities.

In addition, Orbit works in partnership with local authorities, charities and other community-based agencies and services, such as credit unions, Citizens Advice, and employment and training organisations, to support wider community services. It offers its own apprenticeships and training and it is leading several ground breaking experiments in energy saving, including plans to retrofit a 1960s concrete estate, applying Passivhaus principles to achieve higher thermal efficiency standards. Orbit provides some management and specialist services to other social landlords, investing the income it generates into its own not-for-profit activities.

### 3. About LSE Housing and Communities' and Orbit's 'Big Society' Project

LSE Housing and Communities set out to establish the contribution of social landlords like Orbit to the stability, progress and well-being of low-income residents in disadvantaged communities, alongside their wider contribution to society and the economy as social innovators, entrepreneurs, builders and community anchor organisations. The current climate is creating an anxiety that the social, non-profit purpose of housing associations is undermined by market-driven imperatives. Housing associations must show that they are 'commercially viable', meet 'affordable market needs' and develop financially self-sustaining activities. Their social mission could easily be overshadowed by market pressures. Housing associations as social enterprises are having to develop a careful balancing act between their social, their entrepreneurial and their business activities. Retaining their core social housing purpose can sometimes seem to work against their need to remain financially viable.

In this context, we set out to do four things:

- Understand how the Big Society and Localism agendas of the Coalition Government affect Orbit's core functions as a large social landlord providing affordable homes;
- Measure the social value of Orbit's current investments in low-income communities and assess the ongoing support needed for community-based projects to be sustained;
- Develop a framework for delivering community projects in a cost-effective and long-lasting way;
- Explore new roles Orbit can play in supporting communities within severe resource constraints.

LSE Housing and Communities set out to answer four questions:

- What is the added value of Orbit's contribution to the social and economic advancement of the communities where it works?
- What scope is there for Orbit to do more in supporting volunteering within communities?
- What are the key components of a framework for Orbit's social role in the communities it serves?
- What are the costs and benefits of applying this framework to expand social and economic investment using the framework?

For the proposed framework to be realistic we needed to know:

- What funding sources are available for social investment in communities;
- How social and entrepreneurial imperatives interact;
- How social investment fits within the business environment in which Orbit operates;
- The cost of social investment compared with hard-to-measure benefits.

To answer these questions we need to understand the local context, the support networks, and community dynamics. We wanted residents, staff and community leaders to share with us their in-depth knowledge and insights. We wanted to visit residents in their homes and give them the chance to share their views and experiences as Orbit residents in specific communities. So we developed an approach to our research, based on previous experience, which captured basic information and ideas from a large group of residents, and recorded in detail the lived experience of a smaller group of tenants. We based all our interviews – 120 residents, 18 community leaders and 32 Orbit staff – within three contrasting areas of Orbit’s operations. We asked questions on the following topics:

- What is the area like and what do residents find good and bad about their neighbourhood?
- What services do residents use and what gaps in provision exist?
- How do residents see Orbit’s role as a social landlord?
- What feelings and ideas do residents have about their community and how could it be strengthened?
- What do residents need to make their lives more viable in the longer term?

We also wanted to gather practical ideas on Orbit’s social investment in communities. We therefore visited and investigated a large number of community projects and enterprises with the aim of answering the following four questions:

- What community initiatives, either Orbit’s own projects or partnership projects with other organisations, work best and offer the greatest social return on investment?
- What models of community investment can Orbit learn from and draw on, while building on its own strengths?
- How can Orbit tenants contribute directly to community-based services?
- What training and support is needed to achieve this?

We conducted over 170 face-to-face interviews with Orbit residents, staff and area community leaders in three distinct areas. LSE researchers recruited and trained six Orbit residents to act as peer researchers, interviewing fellow tenants in their areas. We also looked into the experience of 25 community investment projects directly supported by Orbit, in partnership with other organisations, or in some cases set up and run by Orbit itself.

Through consultation with Orbit staff, we identified one large urban authority, one town with contrasting stock and one scattered rural area. **Becton Place** in the densely populated London Borough of Bexley, **Brownsover and Cawston** in the large Warwickshire market town of Rugby, and several smaller schemes across urban and rural **Suffolk and Norfolk** became our case study areas. Some of the properties we visited are shown in Figure 1.

**Figure 1a: Orbit homes in South London**



**Figure 1b: Orbit homes in Rugby – Brownsver left, Cawston right**



**Figure 1c: Orbit homes in East Anglia**



## 4. Peer research – the contribution of Orbit’s tenants

With the help of Orbit staff, LSE researchers recruited tenant volunteers to interview fellow Orbit tenants in their areas. This relatively new and untested method gathers information and ideas from tenants by tenants of the same landlord. We used this method because of:

- Orbit’s ambition to work within communities directly by training and up-skilling tenants;
- Orbit’s commitment to maximising the value of its limited resources, while limiting costs;
- The current focus on volunteering and the possible contribution to local communities.

Tenants who showed aptitude in neighbourhood communication, but were not known tenant activists, became volunteer interviewers to gather information from fellow residents, neighbours and friends in their own communities to feed back to the LSE research team. The LSE Housing and Communities team took the resident peer researchers to the National Communities Resource Centre at Trafford Hall in Chester, where residential training over two days helped them to develop communication, interview, observation, recording and writing skills. They completed seven assessed tasks, including carrying out pilot interviews, receiving feedback, and mastering the essentials of the project. Six tenants received a certificate of completion and went on to conduct 60 interviews in the Rugby and Becton areas.

From the outset, the peer researchers, once trained, became part of the research team. Their ideas and local knowledge were invaluable. They thought creatively about the project, and provided unique insights into the views of other residents and the workings of communities. They gained work-related skills, and raised the profile of tenants and low-income communities in a wider arena.

Carrying out interviews via residents is time consuming, both for the peer researchers and the research team. The tenant interviewers need hands-on support and one-on-one contact and feedback. Interview times have to fit their availability. It is not a quick fix and saves only a small amount of money. However, it is very cost effective, using research funds in new ways that create uncoded community benefits.

Figure 2 shows how much is actually involved in making this approach work.

**Figure 2: 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 throughout project.*
- 7 Organisation:** Prepare research packs for each peer researcher as a positive reinforcement of their role, including official ID, stationary, validating letter, pens and clipboard etc. Secure availability of volunteers for interviewing and fix interview schedule.  
*Duration: two days.*
- 8 Feedback:** Convene peer research 'brainstorm' 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: ongoing.*
- 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: ongoing.*
- 11 Round up workshop and celebration:** Organise roundup workshop at LSE to identify cost and benefits and celebrate achievements.  
*Duration: one day.*

The peer research method proved a big success. Half of resident interviews were conducted by peer researchers. There were clear savings to LSE researchers in travelling and interviewing time in spite of the level of organisational support it involved. Peer researchers listed many positive outcomes through their participation: they all said they would do something like it again, and that it had been an eye-opening, challenging and exciting experience. They felt they had made a positive contribution to their communities, and this gave them a new kind of confidence and motivation. Orbit did make some savings by using the peer research method, as well as generating significant community gains.

Some of the gains are impossible to quantify – participants felt they developed new skills, and learnt a lot from the training-first approach. In a roundup workshop, the peer researchers listed the following benefits as a result of their involvement in the project:

- the project provided a **platform for learning about people** and areas in their community;
- the collaborative approach to the project made them **feel proud of their contribution**;
- all found the **training** very helpful and being away at Trafford Hall together very reinforcing;
- all contributed because they **wanted 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 new **friendships**;
- tenants they interviewed also found it a **positive experience**, allowing them to get things 'off their chest', and get their voices heard.

We identified **wider unquantifiable benefits** of the peer research experience, including:

- increased confidence of peer researchers;
- increased local knowledge and understanding of local needs;
- 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;
- more accurate information on conditions;
- identifying useful partnerships and successful service models;
- increasing frontline presence;
- making the case for extending this approach to other activities, for example energy saving;
- improving Orbit's image, reputation and recognition among residents and other organisations.

LSE calculated the cash costs and benefits of the peer research and found savings of around £10,000 on the overall peer research exercise.<sup>2</sup>

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<sup>2</sup> The peer research experiment is explained fully in Bigger than Business Volumes II and III

Important lessons emerge from the peer training experience, and are set out in Figure 3. The peer research method underlines the level of commitment that is needed in order to win residents' active participation. However, **the likely saving and measureable benefits to the organisation justify and outweigh the cost of this investment.** The peer researchers unanimously and enthusiastically responded that it had been a unique and positive experience that they would be eager to repeat. The outcomes for the project - over 60 resident interviews and the active participation and feedback from Orbit residents – provided invaluable insights, cost and time savings.

### Figure 3: 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.

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

## Figure 4: Peer research



Peer researchers arrive at the National Communities Resource Centre where they are introduced to the project, its aims and begin the training.



LSE staff, trainers and the peer researchers get to know each other over a "social housing pub quiz" during the residential training.



LSE staff and peer researchers meet in Rugby halfway through the interview period to share experiences and ideas.



One of the researchers bakes a delicious cake to share with the group.



Peer researchers are invited to London for a final workshop to discuss the findings



Listing the costs and benefits of the peer research experience.



Peer researchers travel to the Chartered Institute of Housing conference in Manchester to present their work

## 5. Main themes and outcomes from interviews

### a. Resident interviews

Among the 120 interviews LSE and the peer researchers carried out, some strong themes emerged:

- two thirds of Orbit residents think their **housing is good or excellent**, and over 90 per cent feel that their **neighbourhood or area is satisfactory**;
- two thirds of residents say the area is **good for families**, but only half feel it is good for the elderly;
- half of residents say there is little community spirit in their area and two thirds do not attend community events; however, **a much higher proportion contribute informally**, helping neighbours;
- two in five residents say **repairs** are good, while three quarters say they are satisfactory. Those with problems have less confidence in Orbit as a landlord;
- nearly one third of residents brought up barriers to **communication**.

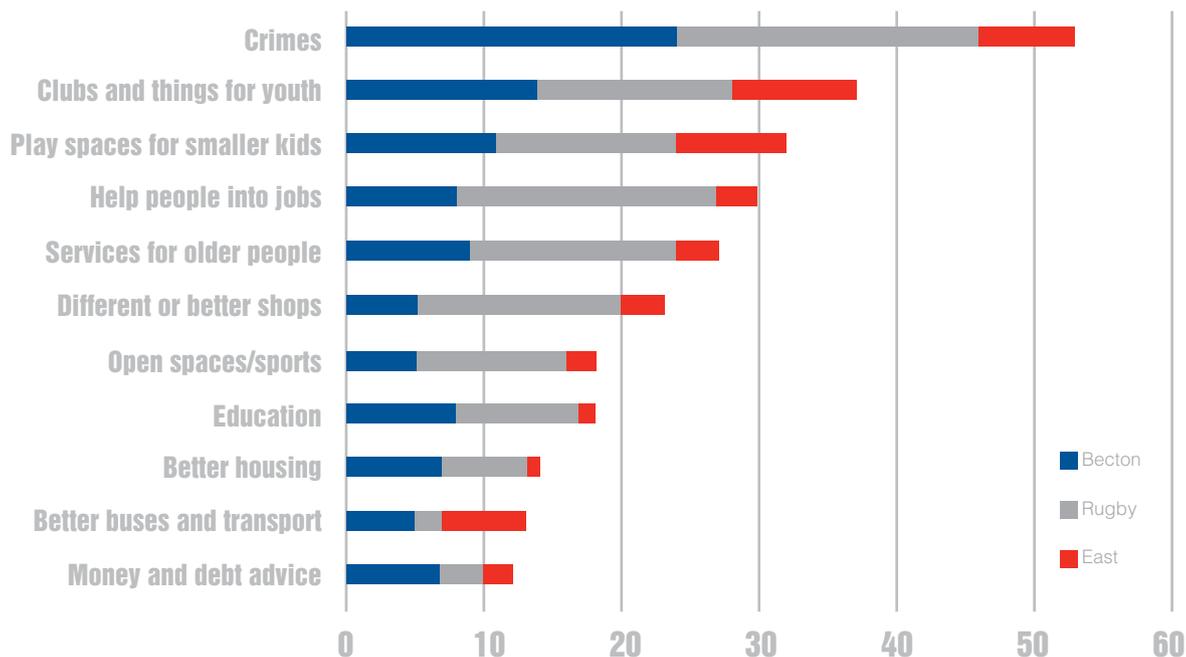
### Resident priorities

The three biggest worries that span the case study areas are:

- crime;
- more facilities for children of all ages;
- helping people into employment.

These and other priority issues are summarised in Figure 5.

**Figure 5: Main priority issues for the area (numbers identifying issue)**

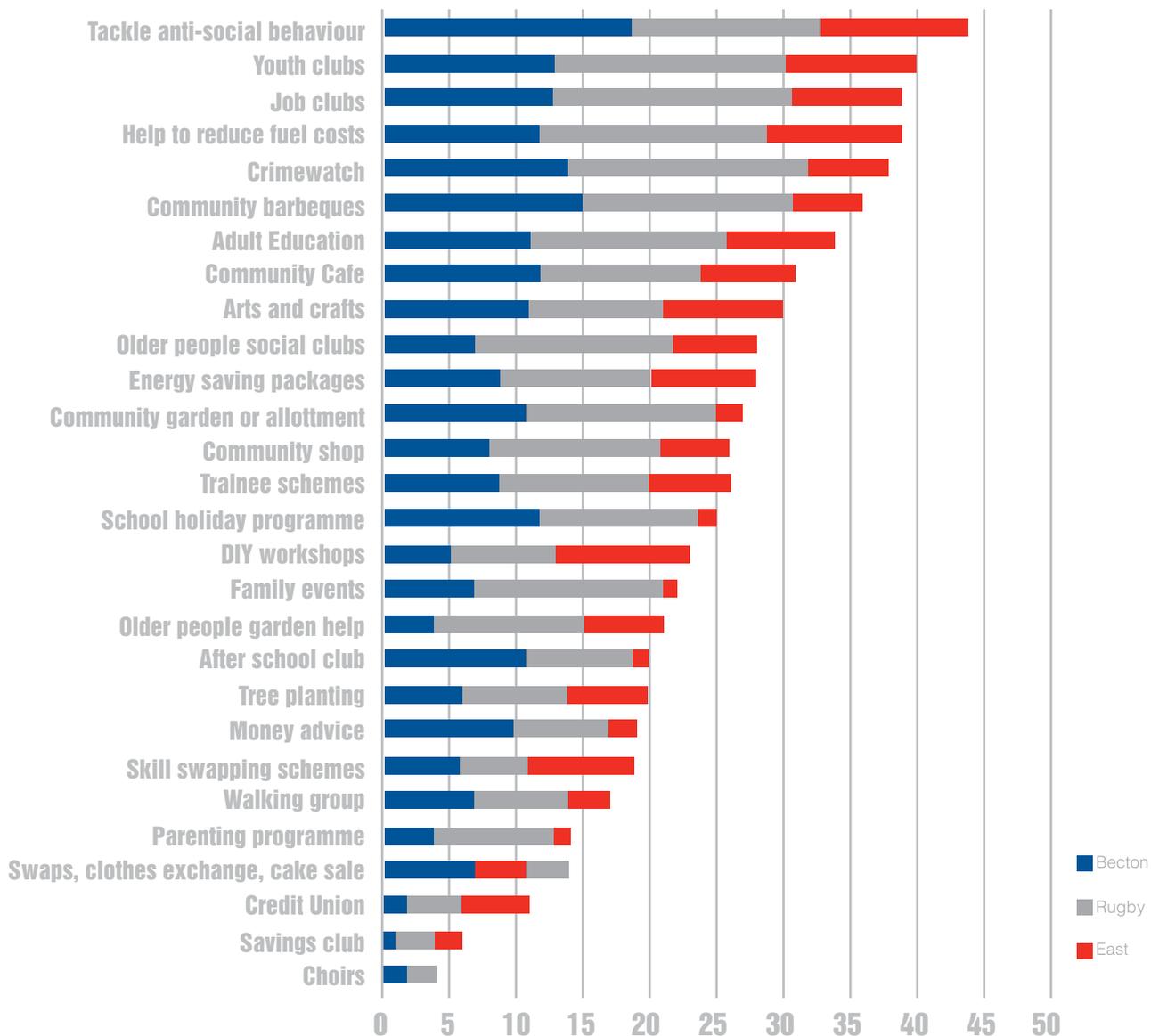


Residents prioritised the following community services for their area (in rank order):

- tackling anti-social behaviour;
- youth clubs;
- job clubs;
- reducing fuel costs;
- crime watch;
- community barbeques and community events;
- adult education;
- community cafés.

These and other useful community services residents identified are shown in Figure 6.

Figure 6: Community services residents would find useful (numbers choosing option)



Residents would like Orbit to do more to help residents to get skills, training, and find employment opportunities. They made four main suggestions:

- helping young people gain qualifications so they can access jobs;
- offering local apprenticeship schemes both within Orbit and linked to other organisations;
- hand-holding residents into training, along the same lines as happened with the peer researchers;
- helping with welfare benefits and money advice so lower income tenants can cope with changes under way.

Most residents interviewed do not know about the community services that Orbit provides and think Orbit could be more involved in the community. The information gap among tenants is startling and applies to many social housing areas and tenants, based on wider LSE research.<sup>3</sup>

Residents highlight three top priorities where they think Orbit can help make communities work better, regardless of the type of housing or areas they live in:

- youth activities, advice and mentoring;
- employment and job training, particularly for young people;
- tackling crime and anti-social behaviour.

These priorities reflect much wider concerns about young people and their limited opportunities today.

They also highlight two other top priorities, which relate to Orbit generally:

- providing welfare and financial advice in the light of major reforms and cuts;
- more support for older people given their increasing care needs and vulnerability.

### **Residents' suggestions:**

As part of the interview process we noted residents' ideas on encouraging community involvement; how best they thought Orbit could help; and how their area could be improved. Residents have many bright ideas on how to make things work better in their community. The ideas that were most popular and which residents seemed most excited about are shown in Figure 7.

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<sup>3</sup> See Bates, K, Lane, L & Power, A (2012) *High Rise Hope* London: LSE Housing and Communities

**Figure 7: 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**.

## b. Staff interviews

The 32 in-depth interviews with staff across the three Orbit regions reveal five main staff **challenges and priorities** for action:

- 1) Many find it difficult to **communicate with residents** and involve them more for the following reasons:
  - residents relate to staff primarily as managers and enforcers rather than simply *"talking to each other as people"*;
  - staff find it difficult to identify residents they can work with;
  - there are some households who are very difficult to deal with or help.

Staff worry about tenant dissatisfaction, leading to an unwillingness to get involved.

- 2) **Partnerships** with other established organisations are invaluable in developing and expanding community projects, bringing many benefits to housing associations:
- external partners bring their “brand” as well as their expertise to provide services of high quality;
  - services being one step removed from the landlord can have certain advantages, e.g. Citizen’s Advice, mental health support, credit unions.

This partnership approach does have limitations:

- it does not overcome or reduce the need for direct involvement between Orbit residents and staff;
  - successful community projects still require that “little bit extra” from housing association frontline staff;
  - partner organisations are also strapped for cash and may not be able to continue to help.
- 3) Staff strongly articulate the need for a **stronger frontline presence**. This is hampered by:
- the wide geographical spread of properties;
  - travel times being too long to make face-to-face contact easy;
  - the reduced ground-level contact, leading to problems going unnoticed;
  - resources dedicated to the frontline being too limited.
- 4) Staff feel there are many **technical gaps in their knowledge**. The things that would help staff most are:
- clearer, more comprehensive information on tenants, to help target services better;
  - more details on the implications of benefit reforms and who will be affected;
  - more understanding of the green agenda, and new green energy savings;
  - more expert support so staff can help and advise residents with greater confidence.

- 5) Staff are worried about the looming **welfare and housing benefit changes**, including:
- income and debt problems already affecting many residents, particularly high energy bills and ‘loan sharks’;
  - worries about helping workless residents to find jobs and training opportunities;
  - the need to provide clear, in-depth financial advice and support to residents ;
  - fear of a mountain of arrears coming to housing associations.

Other worries include the loss of the tenancy support workers in the eastern region; problems with acquiring scattered rural stock; allocation and access policies; and proper enforcement of tenancy conditions. One overriding staff need, articulated in many ways within different issues, is staff and resident training.

Staff also had positive views about the work they do (Figure 8). ‘World Cafés’ were organised in all Orbit areas in May 2012, to collect staff input for the 2020 strategy (Figure 9).

## Figure 8: 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 have 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.

**Figure 9: World Cafés**



### **Staff bright ideas**

Staff members make serious efforts to act on the five main priorities they have identified:

- communication and involvement;
- training for staff and residents;
- welfare changes and implications for Orbit tenants;
- more frontline accessibility;
- local partnership working.

They have many bright ideas on how to do this. Figure 10 presents twelve staff ideas and proposals that might help. Collecting bright ideas among staff through brainstorming sessions, sharing success stories across the organisation, and learning from pilot projects all help in developing innovative services that can plug gaps in Orbit's provision.

**Figure 10: 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 **Citizens 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

One area of staff interest deserves a special mention as it could shape the future and make Orbit a beacon for sustainable housing. Senior staff recognise the value of Orbit's green and energy-saving focus in helping to:

- tackle fuel poverty;
- meet national and international carbon reduction commitments;
- create a low-energy housing stock.

Orbit Heart of England is spearheading the drive for energy efficiency within the group through a variety of projects including:

- energy mapping and tracking;
- developing a beacon new-build Passivhaus project in Coventry;
- providing energy reduction self-assessment kits for residents;
- offering energy advice sessions with local 'energy doctors';
- carrying out area-wide carbon assessments;
- retrofitting existing properties, applying Passivhaus principles as a standard to retrofitting existing homes, as a follow-on to the acclaimed new-build Passivhaus block of flats in Coventry.

These 'green' projects have come about through partnerships with universities, local authorities, contractors, and residents. Orbit Heart of England staff acknowledge that much wider training and education are vital for their sustainability drive to last and to reach all Orbit tenants.

### **c. Community leaders and partners**

We spoke to 18 **local community leaders** in different organisations who are involved in Orbit's community investment. They see Orbit as a good partner, helping community activists through networking, locating sources of funding and mobilising residents. Community leaders want to use Orbit's skills and information base in order to respond to tenants' needs. Orbit also offers useful funding advice. They feel that Orbit could share more information with them and tap their local knowledge more.

Community leaders feel they bring particular benefits including:

- understanding local area needs;
- identifying and interacting with hard to reach tenants;
- providing meeting places for the community;
- generating ideas.

Community organisations and their leaders have developed specific knowledge expertise that Orbit can tap into, and they also have the advantage of being more neutral and independent. However, many are handicapped by funding cuts which affect the services they offer to residents. Multi-agency partnerships to cover widening gaps in community provision have become more and more necessary. Many previously funded community roles are becoming voluntary out of economic necessity.

Orbit staff generally support community partnerships and the role of community leaders, while community leaders have a strong desire to engage more with Orbit staff. They are keen to establish closer ties and working relationships because they feel there is more scope for Orbit to take up grassroots ideas and work more directly with them.

## 6. Exemplary community projects

We came across many fascinating community projects during our fieldwork, including **Orbit-funded** in-house projects (e.g. an estate community facility, community gardens); an **Orbit-led** community partnership (e.g. a Mencap food-training project); and successful **partner-led** projects (e.g. a redecorating and training scheme for vulnerable tenants). Other ground breaking projects include Citizens Advice, financial capability training, area credit unions, and a children's athletics club. Figure 11 and Figure 12 summarise ten of the exemplary projects. These seem particularly valuable forms of community investment, but there are many others. Our findings from the 25 community projects we visited are summarised in the next section and contribute towards the development of our framework.

**Figure 11: Exemplary community projects**



Clockwise from top left: (1) (2) Credit unions at Brough Scott Community Suite, (3) (4) Charlton Athletic in Bexley, (5) Doorstep Learning, (6) Employment Support Staffordshire, (7) Energy Doctors, (8) Orbit Community Investment Fund

We chose the following ten projects 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 areas and thematic content.

**Figure 12: Ten exemplary community projects**

Project	Location	Orbit / Partner Led	Description
Financial Capability Training, CAB Rugby	Brownsover, Rugby	Partner	Developed with the University of Bristol, the project offered two <b>one-on-one sessions with Orbit residents</b> . 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 <b>community garden</b> . 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,	Stratford	Partner	Opening sheltered housing <b>kitchen facilities</b> 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 providing food to 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 <b>surveyed the community to identify top community priorities</b> .
Brough Scott Community Support Suite	Newmarket, Suffolk	Orbit	A <b>drop-in centre and community room</b> 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	<b>Redecorates the homes of vulnerable tenants</b> and provides training opportunities for people interested in decoration. Model has been developed with another housing association to train homeless people in sheltered housing to decorate housing association homes in need of repair. The aim is to develop 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 <b>financial awareness</b> . 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 <b>youth provision project</b> 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 <b>gain employment</b> . 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	<b>Connecting residents with education/training/work experience</b> . All projects are very local to residents. A trial was completed in Margate with good feedback.

## 7. Ingredients of successful projects

Drawing on multiple community case studies and Orbit's own experience, we suggest 10 well established ingredients for delivering successful community projects:

- 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's 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.

Orbit is at a turning point in deciding its priorities and ways of working over the next few years. By structuring its social investment around the ingredients for success that we have outlined, it can make a continuing and expanding impact on communities under increasing pressure.

### **Risks**

The practical steps needed to implement them will help guide investment decisions, but there are risks. The main risks are often 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, then the risks include:

- less hard experience than was claimed;
- personality clashes between staff and other participants;
- delays in the project, caused by someone blocking progress;
- barriers that are beyond the control of the deliverer/implementer;
- cuts in funding.

There are many other risks but our research into Orbit's current social investment programmes shows how significant the social impact and benefits can be of relatively modest investments. Orbit can do more, in a more integrated way, in order to strengthen its overall position as a social enterprise.

## 8. Scenarios for community investment

The 120 residents, 32 staff and 18 community leaders gave us a unique insight into community needs and initiatives on the basis of which we have set out what they value most and what helps most. The work of other social landlords offers some useful ideas, and government proposals in the Social Justice White Paper for Community Investment chime with our proposals. All our findings underline the potential for involving residents in innovative ways.

Drawing on this wide base of evidence, we have devised three scenarios for Orbit's future community investment:

- The **first scenario** involves continuing as now, with a 'Community Chest Freeway' model, sustaining current levels of investment with a responsive, but pepper-potted approach to projects.
- The **second scenario** means increasing the level of investment to retain the 'Community Chest' approach, but to expand the training and community volunteer potential to encourage residents to make an active input into meeting community and social needs, in exchange for skills training, valued experience, work and potential community recognition. We call this the 'Invest to Save' model.
- The **third scenario** incorporates both these approaches, while creating new capacity within Orbit to drive the '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 alongside 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. Figure 13 sets out the three scenarios, their advantages, costs and risks.

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 because of higher demand for elderly care, more household insolvency, higher energy costs and cuts impacting on arrears. This 'invest to save' approach, under scenario two, can combine the kind of close, frontline management and the more strategic focus on social investment that will place Orbit at the forefront of new thinking in the housing world. If implemented at every level, scenario three, the 'Triple Bottom Line', will make Orbit more sustainable in the long run.

**Figure 13: Scenarios for Orbit's community investment**

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

## 9. Social Return on Investment

One of Orbit's biggest challenges is to identify how to find resources for social investment within current constraints. We briefly investigate a popular idea, Social Return on Investment (SROI), to see whether the concept applies to Orbit's community programmes. The SROI 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.

The debate around social finance often overlooks the fact that a powerful, all-embracing framework of ongoing social investment already exists. Our core public and social services – **health, education, sanitation, transport, environment, housing, childcare, policing and so on** – fit within the framework of social finance, producing **a major social return on investment** that in the long run saves society incurring bigger costs and produces economic benefits. These public and social services offer undisputed benefits to society, regardless of political perspective and budget cuts. The social returns are widely considered to far outweigh the costs. Meanwhile, many innovative, grassroots ideas and special projects struggle to secure or hold onto funding. The less 'life-and-death' needs around community and social relations, children's play, crime prevention, are harder to measure and therefore struggle to prove a cash benefit.

To justify extra social investment, Orbit must assess the real costs of leaving social problems unresolved (e.g. rent arrears and debt, anti-social behaviour and nuisance), or only tackling them after the problem has become serious, as compared with investing to prevent or tackle them early on. Most social and community interventions so far show a **non-financial or social return** and Orbit has up until now funded social interventions for social rather than monetary reasons.

The idea of a social return on investment is useful in helping charities, and social and community enterprises think through social spending – checking a project's value to communities and when applied to housing associations, to the landlord, assessing its viability over time. However applying this method to real projects is complicated. By definition, social (non-cash) paybacks are hard to measure. This makes any financial agreement between investors, public bodies and service providers extremely difficult. Furthermore, social benefits accrue over long periods, sometimes a generation, and often indirectly. It is also extremely difficult to control for all the variables involved, including extraneous influences that contribute to a positive social outcome. Because of these complexities, estimates of the social return on investment are often questioned by private investors and will only rarely be 'bankable'. Three cases which may be: curing extreme substance abuse; preventing prison recidivism; and keeping children out of care. It can also apply to disease prevention, such as anti-smoking. 'Payment by results' is an increasingly popular mechanism for encouraging measurable, provable 'returns on investment'. However tackling such extreme problems are **not** the main field of housing association activity.

**However, for social housing organisations there are many social investments** that will help to make landlord services more viable and more rewarding, both for staff and communities, but also for society as a whole. In other words, the long term benefits of social housing provision should outweigh the costs. The examples set out below show the links between housing management, landlord costs and social needs. The investment in frontline management and face-to-face contact is a pre-requisite for positive housing and community outcomes. The following are some examples of investment where the actual return is financial viability:

- **Collecting rent and keeping arrears to a minimum** requires positive personal relations with tenants and preventative engagement; it also requires advice, support, sanctions and enforcement. This investment sustains communities and ensures solvency.
- **Keeping properties occupied** and tenants satisfied requires frontline management which in turn ensures rent payment and repair.
- **Ensuring the right to peaceful occupation** of the home requires action to prevent nuisance behaviour through frontline management.
- **Reducing disputes and anti-social behaviour** goes hand-in-hand with community involvement and local intensive management.
- **Offering training, encouraging voluntary roles, apprenticeships and job support** make landlords more financially viable by indirectly supporting rent payments and reducing social pressures.
- **Protecting and enhancing the local environment** through gardening, recycling, and allotments makes social housing more popular and 'lettable', as well as bringing many social and economic in addition to environmental benefits.
- **Insulation projects and energy saving advice** not only reduce tenants' costs and the risk of arrears, but enhance landlord assets and generate new jobs.
- **Housing vulnerable people** reduces the huge societal costs of homelessness, hospitalisation, etc.

**This brief outline of vital housing management tasks illustrates the close relationship between landlord investments, social and economic benefits.** There are many similar benefits to social landlords from social investments, as our findings show.

Orbit's four strategic priorities for social investment involve more than a project-based or 'pepper-pot' approach.

**Tackling worklessness, financial inclusion, preventing and reducing anti-social behaviour/youth inclusion, empowering independence** all lie at the heart of the 'Triple Bottom Line' model. We would add a fifth priority that bridges social, economic and environmental imperatives – **energy saving** and **environmental protection**.

These five strategic priorities are vital to community cohesion but at the same time enhance the financial viability of housing associations such as Orbit. They constitute the 'Triple Bottom Line' of landlords and taken together they should offer a social return on investment. Orbit as landlord can see a big **social return** on its social investments but any **financial return** is less direct, e.g. reduced rent arrears because of credit unions and financial advice; less vandalism and anti-social behaviour because of more youth provision. There are few funds available for housing associations through social finance or government programmes, except where they tackle acute social needs, where potential cash savings are very big.

Orbit sets aside around one per cent of its revenue (estimate only) for social investment, but it could raise this to two per cent, leading to indirect, but much wider, more strategic benefits, such as we have outlined. To achieve this, Orbit would need to prioritise some key challenges that carry long-term costs but offer real 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;
- community volunteer training to help the elderly and young families;
- job training for residents to create local community services that people need, providing a stepping stone to experience and future work;
- financial advice and debt prevention to combat arrears.

Orbit residents could be more directly involved in Orbit's work, building on 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;
- healthy community cafes in new and existing developments;
- community gardens to reclaim unused patches of land and grow food;
- developing energy advice to implement and apply Orbit's high-level commitment to energy saving;
- using training, volunteering and social contact to encourage resident-based community enterprises.

These investments produce multiple benefits at low cost. They require Orbit to develop and manage the development process, to hand-hold residents as they take on new and challenging roles; to invest in residential training, which is a key to developing the task-orientation; know-how; confidence; and motivation to achieve clear goals. Dedicated staff, whose job is to support, organise and facilitate such activities, need to manage the investment, monitor its benefits and take overall responsibility for the programme. With this approach, Orbit can carry forward scenario three of our model, the 'Triple Bottom Line', while retaining highly responsive social investment.

## 10. Outline framework guiding social innovation and community support

Orbit's ground-level role in communities needs to become part of its wider, more strategic role in an increasingly complex, urban and resource-constrained world.

### The value of a framework

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. Achievable, agreed, ambitious goals need to turn into realisable action plans. A framework provides support to staff and board members in systematising their ideas in response to multiple pressures. A framework helps communities to understand how Orbit works, under what imperatives, with what purpose and sense of direction. Figure 14 below outlines stages of the framework we propose, into which the scenarios feed.

Figure 14: Outline framework



### a. Overarching 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:

1. **The social, economic and environmental imperatives** constitute pillar one because they are **not** interchangeable but utterly interdependent and therefore provide in themselves a framework. **We cannot trade environmental threats for economic potential** because in the long run, the one entirely depends on the other. This presents a significant challenge to conventional housing providers.
2. **The strategic priorities** shaping Orbit's work form the second pillar. Meeting acute need in a situation of intense cutbacks in funding is a huge challenge to viability. The credit crunch, a double-dip recession, high youth unemployment, radical changes to welfare, weak house building, all impact Orbit's core business. Orbit cannot defy, escape or hide from these pressures. But it does have a social mission and ethical principles that underpin its responses. By sticking with these, it will find its way more easily 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 high risk new initiatives. Within these constraints, Orbit can innovate to focus on social advancement in enterprising and ground breaking ways, **'providing the fishing rod rather than the fish'**. The pressures of inequality, the harsh impact of cuts, and the potential risks to Orbit of current policies, make **community resilience and self-reliance a strategic priority**.
3. **Practical constraints and responsibilities** make up pillar three. Owning property and renting it out at low rents to families, the elderly, and the young in many different communities, and with many different types of property, carries 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 a social landlord without getting involved in social conditions. The practical landlord role opens the door to **innovative, cost-effective and grounded community interventions that support Orbit's role in neighbourhoods**. It is the practical landlord role that brings together housing and social priorities.
4. **Resources** shape pillar four and define Orbit's real potential. In practice there are both huge resource challenges, as shown in pillar one on a global and national scale, and also significant resource potential within large social landlords like Orbit. Orbit has a valuable asset base, a strong rent stream and a community base in up to a third of all local authorities; a social and physical infrastructure providing many vital services; and impressive partnerships which expand its ability to solve problems. It also has lively staff teams, keen to do more, as the World Cafés showed; and tenants who, with support and carefully planned training opportunities, can deliver practical help within communities. Orbit can draw on these resources to strengthen its partnerships and its own role.

The four pillars underline the central role of Orbit as champion of sustainability, and of local initiative, of social/housing delivery (Figure 15). This overarching framework, 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.

**Figure 15: Four pillars of an overarching framework**

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

## b. Applied framework

A more structured applied framework for community intervention and social support is vital for several reasons:

- Firstly, the current responsive approach, **with multiple, distinct projects across three large regions**, needs to be more systematic and more carefully followed through. A more structured approach building on existing good practice offers many advantages.
- Secondly, Orbit invests significant resources in small grants, but it is unclear **what return it should get to match the inputs**. A clearer framework would help measure input costs and benefits.
- Thirdly, Orbit's own **strategic priorities for social investment – tackling worklessness, financial inclusion, preventing and reducing anti-social behaviour/youth inclusion, empowering independence – do not always translate directly into action on the ground** and are not sufficiently applied.
- Fourthly, the **severe resource constraints facing Orbit** in the future are mirrored by serious cut-backs in welfare benefits, public services and job opportunities, affecting Orbit's tenants and the communities where its homes are located. Therefore, **social need is growing while resources are shrinking**.

These four factors make the **social** role of **social** landlords both more vital and more challenging. The money will be harder to find and therefore must go further, so the enterprise role must come to the fore.

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. The applied framework is not a magic bullet. Community progress depends on a **long-term, steady commitment, clear priorities, ongoing support** and **local ability to respond** to need. The applied framework helps managers assess project ideas and support their development. Ground-level staff can work within this framework, using the ingredients for success and practical steps set out earlier, to shape projects as they are implemented. We set out each strand in Figure 16.

**Figure 16: Six strands of the applied framework**

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

Overleaf are brief explanations of what each strand means in relation to Orbit's work.

- 1) **Entrepreneurial flair** shows up in practical examples. For example, the financial inclusion team in Bexley is working with the Credit Union on ways to orientate tenants' savings towards covering arrears. Recruiting residents and supporting residential training to deliver on community projects requires Orbit staff to show real enterprise, as they did in the Peer Research Project.
- 2) **Sticking to the knitting** means prioritising ideas and actions to deliver competently **and** with flair. This approach implies a strong frontline presence and community links, which Orbit's Directors support through the likes of space, staff, cash, partners.
- 3) **Ongoing, 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. Social as well as housing problems are reduced this way.
- 4) **Training and job potential.** There is definitely 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; and resilience and long-term payback. Tenants and staff seem keen on this approach.
- 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 this payback through transparent, simple monitoring.
- 6) **Local sustainable development.** The overarching problems we identified above can seem overwhelming and they require many local actions to buttress alternative ways forward. With very rare exceptions, bigger problems are cumulative, linking many smaller problems, played out in smaller communities – their solutions likewise. **Making and keeping low-income neighbourhoods viable** is key to wider environmental protection, social survival and economic progress.

### **c. Ingredients for success and practical frontline steps**

The ingredients for success that we developed offer practical pointers to action on how the framework can be implemented. Orbit has to respond to the internal needs of the organisation and its neighbourhoods, as well as the external environment. These pressures are shifting rapidly, reducing Orbit's room for manoeuvre while encouraging independent, innovative approaches to problem-solving. Linking together wider priorities and pressures with very local needs and problems, requires both the key ingredients and practical steps that will make a real difference in communities, while helping Orbit remain a viable social business.

**Figure 17: Practical frontline steps for community investment**

- 1) The **type of area and concentration of Orbit property** must shape the activity.
  - Identify and actively cultivate relevant local partners
  - Uncover potential volunteers
  - Constantly revisit local needs
  - Have simple, responsive, accessible methods
- 2) **Staff** require certain **qualities** to sustain initiatives over time.
  - 'Personality' and drive
  - Responsive approach
  - Strong community orientation
  - Clear communication channel
- 3) **Innovative** approaches must be **coupled with a grasp of 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 essential
- 5) **Grounded activity engenders human contact** and this in 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 experience 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) **'Ringfence' priorities** and give them high profile.
  - Training, jobs
  - Financial inclusion
  - Elderly care
  - Young people and families
  - Community activities
  
- 9) A **plan of action needs to be checkable** by others.
  - Market research shows whether there is a big enough take up
  
- 10) **Monitoring and evaluation** requires an external, once-removed method.
  - Feedback mechanisms keep tabs on projects' social impacts
  - A work diary, for example, keeps daily records.
  - Regular visits from managerial staff will ensure updates on the progress in the projects

### Fitting the framework together

The overarching pillars support the applied framework, which drives the ingredients for success and practical steps of delivery. 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 to deliver projects to see both what they actually need to do, and trace their local ground-level actions to high-level decisions. Figure 18 shows how the overarching framework fits with the applied framework and how these inform the ingredients for successful projects and practical steps that need to be taken by frontline staff to maximise the potential of Orbit's community investment.

Figure 18: Framework for delivering community investment



## 11. 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 policy ideas and funds;
  - co-ordinate major bids;
  - develop 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 and local staff.

- 2) Recruit **team-based social enterprise organisers**: This would simply re-frame positions, to provide ongoing organisational back-up; business planning; vetting; training; recruitment; 'hand-holding'; and follow-through. Implementing projects requires this dedicated support. Promoting 'bright ideas' and success stories needs someone once-removed from the immediate ground-level tasks.
- 3) Expand **face-to-face staff contact with residents**: Introducing Brompton bikes (which fold up and fit in cars) would make staff more visible and give them more openings for informal contact. Our researcher did this very successfully, even in very bad weather! (Figure 19)
- 4) Adopt **a systematic, personalised, and controlled approach to recruiting residents into responsible voluntary roles**: The Green Deal; elderly care; youth mentoring; family support; financial advice and other activities, lend themselves to this approach. Local authorities may want to partner in this approach.
- 5) Offer more **consistent staff training across the board** in the areas of Orbit's strategic priorities:
  - tackling worklessness;
  - financial inclusion;
  - preventing and reducing anti-social behaviour/youth inclusion;
  - empowering independence;
  - energy saving.

- 6) Make **energy saving a central priority** in the light of:
- Orbit's record and experience;
  - potential funding from energy companies, Green Deal and others;
  - community buy-in;
  - wider priorities and threats;
  - our Climate Change commitments.

**Figure 19: LSE Housing and Communities' researcher cycling to interviews in Orbit areas**



## 12. How Orbit can implement the framework

### ***Orbit's neighbourhood bases***

Orbit's physical bases within communities will support 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 support multiple community activities and can be used for many very different functions, as we saw in some places.

### ***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. Orbit needs to enhance face-to-face ground-level contact without seriously adding to costs. The bright ideas staff outlined suggest many ways of connecting with residents. LSE researchers found that cycling around the estates we visited generated lots of new contact with residents. Orbit needs special strategies for its scattered and hard-to-manage stock.

### ***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 by identifying new partners that are strongly aligned with Orbit's 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 key as a vital step in producing social, as well as environmental gains. Governments are committed to it and residents will buy into it if they understand and feel the gains. Orbit should make energy saving a top priority and build on its already strong track record, to become a beacon in a field which will grow in importance in the next decade, and offer a clear payback.

Orbit's successful investments in green technologies and energy saving should inform further progress through:

- group-wide adoption of ambitious energy efficiency goals with a core policy drive from the central team, to maximise inputs and benefits;
- development of a peer adviser/volunteer training programme to pioneer the role of 'green champions' in Orbit;
- 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. If Orbit raised its social investment to two per cent it would produce positive and some immediate strategic benefits. To achieve this it would need to prioritise strategic issues that carry costs but offer long-term payback if tackled in advance of problems mounting. 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. Firstly, 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. 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 social and management expertise, offering real potential for growth.

Secondly, the existing housing stock in this country (private and social) will still provide 70 per cent or more of all homes in 2050, and over 85 per cent of homes already built will still be in use in 2050. Therefore, 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 offer a potential laboratory for social innovation.

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 powerful enough financially, unlike big developers, to win consistent government support. They can easily overlook their existing stock and their direct landlord roles. They are therefore not strongly enough defended by voters. 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. They are bigger than business and society needs organisations such as housing associations to build a better future.



# Bigger than Business:

Housing associations and  
community investment in  
an age of austerity

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Volume I

Published November 2012



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