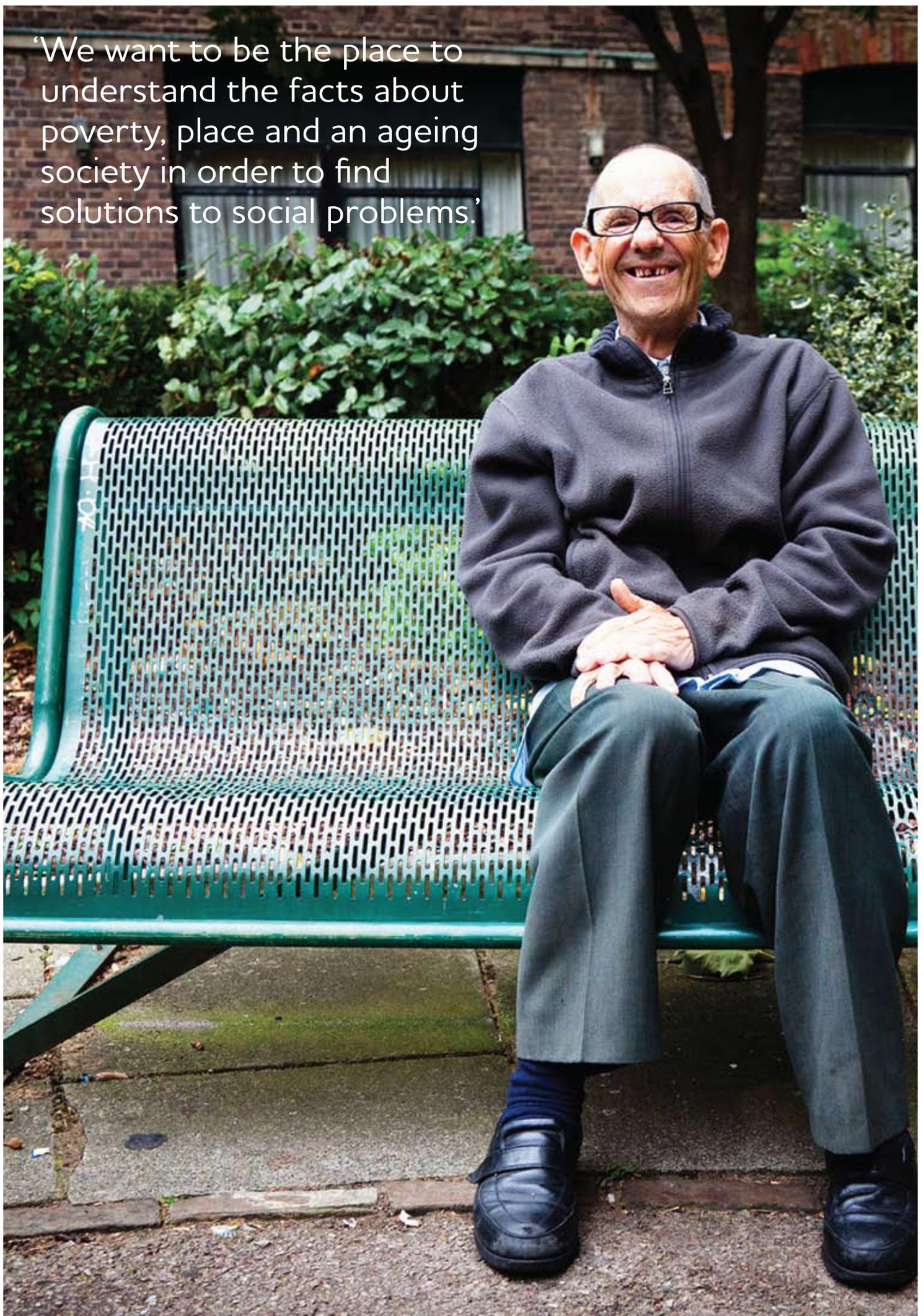


# STRATEGIC PLAN 2012–2014

‘We want to be the place to understand the facts about poverty, place and an ageing society in order to find solutions to social problems.’



## **TOGETHER JRF AND JRHT AIM TO:**

- achieve lasting change for people and places in poverty;
- build communities where everyone is able to thrive; and
- contribute to a more equal society.

Now and for future generations.

## **THIS PLAN SETS OUT:**

- how we will do this over the next three years;
- the kind of organisation we are; and
- the kind of organisation we aspire to be.

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# PART 1

# WHO WE ARE AND WHAT WE DO

We live in challenging times. For JRF and JRHT, the obligation to spend every pound well has never been greater. With a proud heritage, skilled staff, strong connections and complete independence, we have real potential to contribute to the common good. We accept the responsibility this brings.

The changes around us – austerity, globalisation, climate change, an ageing population, demographic change and technological advancement – present challenges and risks for us all. Together they bring the threat of social division and conflict, setting people and communities against each other. And there is the very real, practical and moral risk to our society that poorer people and places suffer most.

But these changes also bring opportunities for achieving greater social justice. This is a time to:

- foster a feeling of community and solidarity and create a more socially just society;
- develop greater understanding and try new approaches;
- promote the common good in a way which enables everyone to thrive and to achieve their full potential.

We intend to make the most of these opportunities over the next three years.

We will do this by contributing evidence, ideas and solutions to:

- identify the root causes of poverty and injustice;
- support communities where everyone can thrive; and
- plan and develop for an ageing society.

We are independent but we are not neutral: we are on the side of people and places in poverty.

We will work in partnership with others in the North of England and across the UK to achieve our aims, while protecting our independence.

Diversity is at the heart of our work as an employer, service provider and policy and research business. The diversity of the UK informs everything we do.

### What do we do?

Over 100 years ago, we were established to provide housing in communities and to understand the root causes of social problems. In the twenty-first century we continue to do just that.

At JRF and JRHT we:

## SEARCH

out the underlying causes of poverty and inequality, and identify solutions – through research and learning from experience

## DEMONSTRATE

solutions – by developing and running services, stewardship of our land and buildings, innovating and supporting others to innovate

## INFLUENCE

positive and lasting change – publishing and promoting evidence, and bringing people together to share ideas

## How do we behave?

We are:

- **bold:** we tackle challenging and potentially threatening issues, ask difficult questions, and take risks with new ideas and approaches;
- **focused:** we are committed to our long-term aims, but remain flexible and adaptable;
- **independent:** we work across the political spectrum, and with partners in all sectors;
- **connected:** we value being part of diverse policy, practice and research networks. And we value being connected to people who have direct experience of the issues we are working on or the services we deliver;
- **collaborative:** we work in partnerships where together we can be more influential;
- **evidence-based:** we learn from and share evidence from research and experience to develop solutions. We are a place to get the facts;
- **practical:** we develop and deliver services, and look for ways to ensure our research is informed by practice, so creating practical solutions;
- **caring:** we run services, seek out evidence, and influence with what we know because we care passionately about improving the lives of poorer and more disadvantaged people.

## What will we invest?

Over the three-year period covered by this plan, JRF and JRHT together expect to invest up to £125m. We are not immune from huge global financial challenges and may need to change our plans in response. More significant elements include:

For JRF, investment of:

- up to £23m in our research, policy and practice development, influencing and communications activities.

For JRHT, investment of:

- up to £30m in direct service provision for older people and demonstrating new approaches;
- up to £21m providing neighbourhood-based services across our operations; enabling residents with learning difficulties to live independently; and supporting community action. This includes around £0.7m on enhancing the energy efficiency of existing JRHT homes;

- up to £43m on new developments. This will include approximately £14m on new services for older people at Red Lodge in New Earswick, and work on village facilities to enhance the heart of this community. Working with our partners, we will invest £23m in the period of this plan in developing Derwenthorpe on the edge of York, which will eventually have 540 quality homes to rent, part-own or buy.

## Where do we work?

JRF and JRHT work across the UK, covering England, Scotland, Wales and Northern Ireland. Policy and practice diverges across the different administrations. We intend to make sure that we all share and learn from our different experiences. We will also learn from countries outside the UK.

We are based in the North of England, with services and activities across Yorkshire and in Hartlepool. In the next three years we will strengthen this part of our identity. We will take on some work specific to the region, using this to help shape public policy responses across the UK.

Our origins and headquarters are in York. We will continue to support York's voluntary and community sector, with a particular emphasis on the changing demography in our home city. We will contribute to the work of the York Fairness Commission as plans to reduce the budget deficit are implemented across the UK. 2012 is the 800th anniversary of the Charter of the City of York; we will work with others in York to support the celebrations.

We are eight years into a ten-year commitment to working in Bradford, supporting the city and district in the challenges and opportunities it faces.

'We work in the four nations of the UK to make sure we all learn from our different experiences.'

## How do we influence?

JRF and JRHT aim to influence both policy and practice. We influence governments across the UK, local authorities, service providers in all sectors, practitioners, business and public attitudes. We do this by:

- publishing the research we commission;
- sharing our experience of running services;
- providing platforms for people to make their own experiences known;
- bringing people together to debate and share ideas;
- promoting our findings to those able to influence policy and practice through the media and other channels;
- working with partners to make sure our evidence is influential and that the voices of people in poverty are heard;
- understanding the changing digital climate and its particular role in influencing, so that we use technology and other media effectively;
- making sure our evidence is used by relevant players throughout their careers, with a special focus on ensuring younger people become familiar with us as a source of facts about poverty, place and an ageing society.

## How will we know if we've made a difference?

We will monitor progress against measures set out in our business and programme plans. In the next three years we will commission independent evaluations of aspects of our work so that we – and others – can learn as much as possible from it. We will assess where we have and haven't had impact.

# PART 2

# OUR AIMS

We want to use our money to be most effective in achieving change for people and places in poverty, while we plan for the opportunities and challenges of an ageing society. These aims show how we are prioritising our research, development and practice work to achieve this, as well as our business as an employer.

## Poverty

**Our aim:** To identify the causes of poverty and inequality, and find solutions

For over 100 years, we have investigated the root causes of poverty, monitoring its effects on people and places in the UK. Today, in a context of globalisation, financial and economic strain, austerity measures and extensive welfare reform, those at greatest risk are the poorer members of our society. But poverty isn't just about money. We want to understand exactly how much money does matter, and its interplay with other factors such as housing, education, aspirations and culture. We will search for practical strategies to reduce poverty, and wider social and economic inequalities, focusing particularly on the contribution that work, skills and economic growth can play now and in the future.

In the next three years, we will:

- be a place to get the facts about poverty and inequality. We will:
  - monitor trends over time against key indicators
  - extend our work on Minimum Income Standards
  - be a place to learn about the experiences of people in poverty in the UK;
- produce an anti-poverty strategy for the UK, bringing together what we know from all our work and understanding of poverty;
- track how the response to the deficit, this period of austerity and policy change are affecting levels of poverty and inequality, and how disadvantaged people and places are coping;
- help develop practical solutions to reduce poverty that are evidence-based, tested and taken up by others;

‘... we will help develop practical solutions to reduce poverty that are evidence-based, tested and taken up by others.’

- investigate the role that skills, work and labour markets can play in reducing poverty and inequality, and use this to inform debate on economic growth and development;
- equip policy-makers around the UK to understand the complex causes and dynamics of poverty, including how it relates to ethnicity, disability and ill-health across the age range;
- strengthen support for anti-poverty measures by challenging negative perceptions of people in poverty;
- explore how culture and behaviour can affect the lives of people in poverty;
- increase the quality and number of relationships we have across business, education and skills sectors;
- work with others to inform policies in the North of England which bring regional economic growth but also benefit people and places in poverty, and support practical ways of reducing poverty, destitution and inequality in York and Bradford;
- refresh JRHT’s anti-poverty strategy to maximise the income of JRHT residents by:
  - providing information and advice
  - promoting the credit union
  - enhancing energy efficiency in new and/or refurbished homes
  - exploring the potential of community enterprises;
- work towards being an anti-poverty organisation, putting our poverty research into practice in our own organisation. In particular, we are working towards, over the period of this plan, paying all our staff a wage at least equivalent to JRF’s Minimum Income Standard for a single working-age adult. We will monitor our progress towards this and the impact it has. We will share what we learn with other employers to influence their approaches.

## Place

**Our aim:** To support resilient communities and places where people thrive

The place where someone lives is central to their quality of life. For decades, we have promoted the importance of housing, neighbourhoods and a sense of community. We will continue to do so. We are interested in how housing can be adapted to suit different types of household and the varying needs of people at different stages of life. We want to understand what makes good neighbourhoods and resilient communities in our changing world. We believe it is vital to address persistent issues of homelessness, housing supply and access to affordable and quality housing. At a time of opportunity and austerity, JRHT will continue to demonstrate innovation, while retaining our status and responsibilities as a small, focused and independent provider of quality housing and care.

In the next three years, we will:

- be a place to get the facts about how social, economic, environmental and policy changes affect housing, neighbourhoods and different places in the UK, and how different housing options influence people's prospects;
- find ways of improving the quality, choice, stability and flexibility of housing for disadvantaged groups, including young people and people on low incomes;
- explore and/or invest in:
  - new designs for low-cost housing and prototypes for market testing
  - ways of housing homeless and destitute migrants
  - better housing options for people aged 25–35
  - affordable ways to reduce carbon emissions and improve energy efficiency
  - the role of technology in creating resilient and inclusive communities;
- provide policy-makers and practitioners with evidence and ideas that enable them to think strategically about:
  - housing for future generations
  - the impacts of climate change on social justice;

'Over the next three years we will find ways of improving the quality, choice, stability and flexibility of housing for disadvantaged groups.'

- support ways of connecting people in Bradford across different communities, sectors and agencies;
- work with our partners to build homes at Derwenthorpe, on the edge of York:
  - providing quality homes to rent, part-own or buy
  - innovating in house design, energy efficiency, environmentally sustainable construction, and community development;
- strengthen our relationships with housing providers, local authorities, developers and neighbourhood organisations, to learn from their experience and develop ways of meeting needs for housing and communities;
- continue to invest in housing and neighbourhood-based services across JRHT operations, in particular enabling residents with learning difficulties to live independently and engage with their community;
- continue to support and welcome residents who want to contribute to JRHT's management and development;
- assess the land, buildings and other assets we own so they meet our strategic priorities and our residents' needs.

## An ageing society

**Our aim:** To respond positively to the opportunities and challenges of an ageing society

UK society is ageing. This presents us with huge opportunities and challenges. It has far-reaching implications for us all, whatever our age. It will affect our relationships – how we live together and support each other – within our families and neighbourhoods. It will touch every part of our lives – money, work, jobs, housing, benefits, health, social care, media, technology and design. As a provider of housing, care and neighbourhood services, and as a funder of research, we want to use the next three years to explore what our ageing society means for:

- older people;
- people and places in poverty;
- human rights;
- diversity and equality; and
- across generations.

‘UK society is ageing. This presents us with huge opportunities and challenges. It has far-reaching implications for us all, whatever our age.’

In the next three years, we will:

- be a place to get the facts about what an ageing society means across and within different generations;
- bring different people together to explore how society can adjust and respond well to an ageing population;
- be a place to learn about the experiences of older people who need a lot of support – what they want and value from life, and the changes needed to make this happen;
- explore how concerns around risk and regulations affect care and support for older people;
- continue to run imaginative, high-quality and responsive services for older people in the North of England, informed by research, and embedding the principles of My Home Life’s relationship-centred approach in all JRHT’s care and support services;
- develop new extra-care services for older people at Red Lodge in New Earswick, informed by residents, research and best practice, and refresh village facilities to support community life and better relationships between generations;
- continue to learn from people who are excluded from power, and understand approaches to increasing and bringing about positive change;
- develop and evaluate inspiring, practical examples of:
  - a dementia-friendly city (York) where people with dementia play a central role in creating a plan that works for everyone;
  - neighbourhoods where people feel less lonely, based on our work in Bradford and York;
  - neighbourhoods which are good places to live for all generations, based on our work in New Earswick specifically, but also Bradford and York.

# PART 3

# OUR ORGANISATIONAL AIM

Our aims are ambitious. To achieve them, we must operate effectively and economically, getting the best value from every pound we spend. And we need a culture that gives our staff the confidence, skills and authority to contribute to real and lasting social change.

We welcome opportunities to learn from others. We will share our own knowledge and expertise.

Over the next three years, we will:

- work towards paying our Minimum Income Standard across JRF and JRHT, and establishing progressive pay scales. We will share what we learn with others;
- support our anti-poverty strategy by:
  - providing meaningful learning and development opportunities and clear career progression for our lowest-paid staff
  - developing flexible working policies that enable staff to achieve a better balance between their home and working lives
  - benchmarking our pay and benefits against those of other employers to improve performance;
- respect and celebrate difference in our work places. We recognise the unique value of all individuals and how we learn from varied perspectives and experiences. We aim to increase diversity within JRF and JRHT through:
  - a strong diversity policy
  - high-quality recruitment processes
  - flexible working policies, and
  - enhanced supplier arrangements;
- be a place to learn and share evidence by:
  - providing learning and development opportunities that help our staff contribute to our aims
  - providing each staff member with an individual work and learning and development plan
  - diversifying routes into employment, including internships (seven each year) and apprenticeships (12 each year), and
  - building close working relationships with local education providers;

‘We are an anti-poverty organisation. We are committed to introducing our Minimum Income Standard for all our staff, as well as training and progression for the lowest paid. And we aim to develop a poverty strategy for the UK.’

- act strategically and creatively in order to influence policy and practice across the UK. We want to influence government, local authorities, business, professional bodies, providers in all sectors, and practitioners as well as public attitudes. And we will monitor progress and evaluate outcomes against measures set out in our business and programme plans.
- increase opportunities to work collaboratively so that we can be more effective and influential, by:
  - creating partnerships and alliances that include the communities we work in: public, voluntary and private sector organisations, as well as other trusts and funders
  - improving our engagement with JRHT resident and community groups, ensuring they play a significant role in shaping our direction;
- make the very best use of our resources, including staff, premises, finances, knowledge and technology. We will do this by:
  - setting clear performance targets and monitoring progress
  - reviewing our policy on value for money
  - ensuring we use our time, money, physical space and carbon effectively
  - working with an effective Staff Council to ensure we are getting value for money, setting high standards and empowering staff to deliver effectively;
- consider sustainability in all our activities and reduce our impact on the environment. We have a special commitment to reduce our carbon emissions (as measured in 2010) by at least 20 per cent by 2020, and will aim to reduce them by 25 per cent;

We are willing to change to meet the needs of society and our founding purpose. We will encourage adventurous and ambitious approaches that help us to achieve our aims. JRF and JRHT will work together to empower our staff and create an environment where everyone’s voice is heard and respected in the organisation.

# PART 4

# OUR SHARED FUTURE

The next three years are uncertain for all of us. At the time of writing, we are in a period of global economic turmoil. While this presents us with rare opportunities to change our society, it also presents the very real risk that people and places in poverty will be hardest hit.

In this plan, we have set out the priorities that will guide JRF and JRHT over the next three years as we seek to make social justice a reality, using evidence from research, practice and experience.

We will be bold and ambitious. Alongside a clear and unwavering focus on reducing poverty and inequality, and on creating resilient communities that help people to thrive, we will focus on the steps we need to take as society ages.

We look forward to working with partners in all sectors to deliver this plan.





“When Joseph Rowntree established his trusts in 1904, he tasked us with seeking out ‘the underlying causes of weakness or evil in the community, rather than remedying their more superficial manifestations’. This, he said, was a need he expected to remain throughout the life of the trusts.

In the twenty-first century the world we live in may have changed, but our core purpose is the same – to understand the underlying causes of social problems in order to achieve lasting change for people and places in poverty; to build communities where everyone can thrive, and to help create a more equal society.”

Tony Stoller CBE  
Chair of Trustees



JRF is an endowed foundation that funds a large, UK-wide research and development programme.

[www.jrf.org.uk](http://www.jrf.org.uk)



JRHT is a registered housing association, managing around 2,500 homes, and is a registered provider of care services.

[www.jrht.org.uk](http://www.jrht.org.uk)

This information can be provided in your own language

我們也用您們的語言提供這個信息 (Chinese)

এই তথ্য আপনার নিজের ভাষায় দেয়া যেতে পারে। (Bengali)

Ta informacja może być dostarczona w twoim własnym języku. (Polish)

Bu bilgiyi kendi dilinizde almanız mümkündür. (Turkish)

یہ معلومات آپ کی اپنی زبان (بولی) میں بھی مہیا کی جاسکتی ہیں۔ (Urdu)

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It is also available in other formats (such as large print, Braille or audio) from the Communications Department at JRF  
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