

Fairoak Housing Association

3year forecast & business strategy
2007-2010



contents

3 YEAR FORECAST & BUSINESS STRATEGY 2007—2010

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1 Summary

- 1.1 The sole purpose of the charity Fairoak Housing Association is to provide a variety of accommodation, sometimes specifically adapted, to meet the needs and requirements of our end customers (people with learning and other disabilities). This document is designed to demonstrate how we currently work to meet our purpose and our agreed objectives.
- 1.2 Prior to focusing on the here & now and looking towards the future, we need to be aware of the background to the formation of the company.

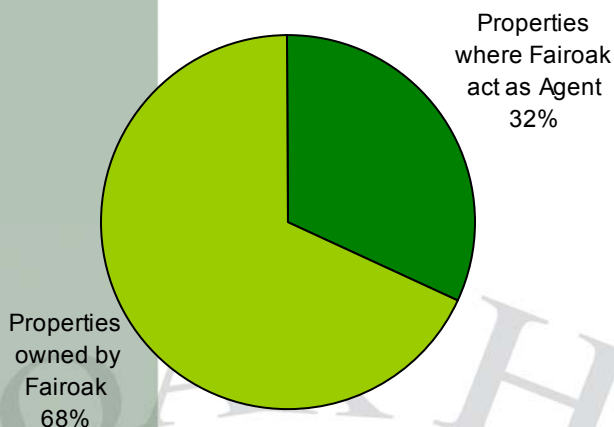
2 Organisational Profile

- 2.1 The company was originally formed in 1990 and at that time was interested in the provision of residential care for people with learning disabilities within a small geographical area of Cumbria. In the late 90s the company changed its name and expanded its working constitution to allow for the opportunity of growth within the care, support, education & training for children and adults with disabilities, but kept its housing related services solely for the use of people with learning disabilities. The company also expanded its geographical areas working across five counties within the north of England. During 2002 the company changed its name to Fairoak Housing Association with its sole purpose and focus within the provision of housing and housing related services for people with learning disabilities. The other areas of its work have been passed over to a new company known as The Oaklea Trust with whom the Association continues to have a close working relationship.
- 2.2 The reason for the most recent company change was to afford the end customers choice.
- 2.3 Fairoak Housing Association provides a range of accommodation, which is designed and/or adapted to meet the demands, needs, and desires of its customers. Its sole purpose is to promote independent living for people with learning and other disabilities.

3 The Association

- 3.1 Fairoak Housing Association is a charitable society registered under the Industrial & Provident Societies Act. Registered Number 28173R.
- 3.2 The Association employs a small workforce responsible for the day to day running of the Association, property maintenance, and quality management and the development of new and innovative housing options for our customers.
- 3.3 The Association is both owner and landlord, but we also act as agents for private landlords who are interested in providing high quality accommodation for our customer group.

Split between properties owned and man-



4 Statement of Equality of Opportunity

4.1 Fairoak Housing Association is committed to a policy of equality of opportunity and non-discrimination; discrimination will be defined as “where an individual is treated less favourably on grounds of sex, marital status, race, disability, sexual orientation, gender reassignment, age, religion, political affiliation, and/or union membership.”

5 Mission Statement

5.1 Fairoak Housing Association’s sole purpose is to provide affordable and suitably adapted housing for people with learning and other disabilities.

5.2 The goal of the Association is to offer continuous improvement, ensuring effectiveness and efficiency, through a framework of equality and values that promote the rights and desires of people with disabilities.

6 Vision Statement

6.1 To provide a quality Housing Service which meets demands, needs and desires of our customers, and promotes independent living for people with learning and other disabilities.

7 Types of Accommodation Provided by the Association

7.1 We provide a variety of accommodation options including new design and build, refurbishment of existing stock and redevelopment of existing buildings to provide suitable accommodation.

For example a derelict former council owned block of flats was refurbished by the Association to provide 3 double and 3 single modern flats with facilities to accommodate 24 hour staff cover in the form of an office area and sleep over room. A more recent project has seen a former public house completely redeveloped into 4 individual flats which will incorporate the most up to date assistive technology to support the tenants to live as independently as possible.

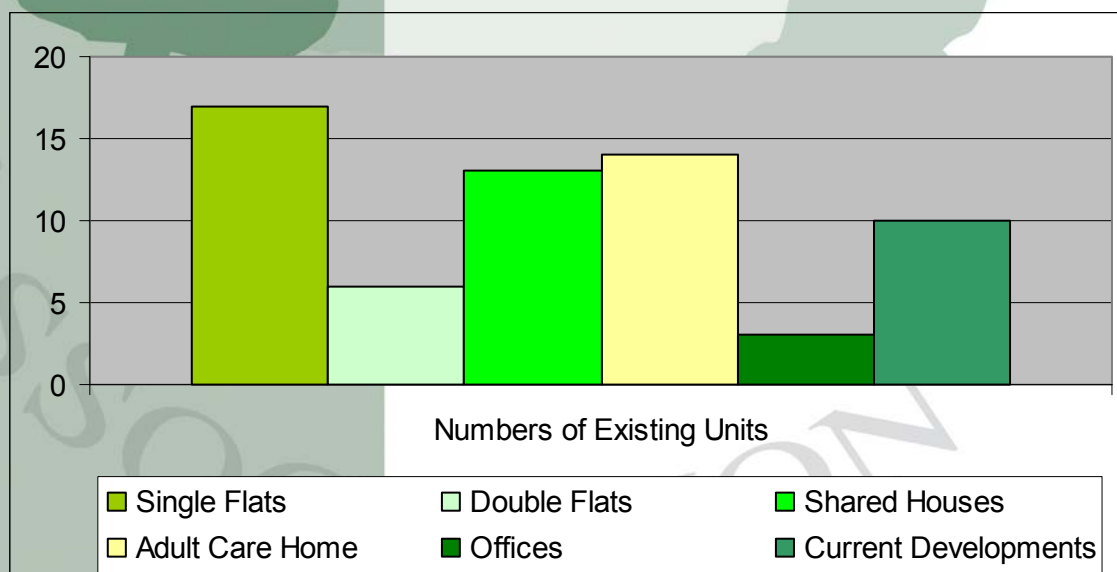
The Association is also keen to develop further opportunities for our customers to become owners or part owner occupiers of their properties.

7.2 Care and support options

Fairoak Housing Association works with a number of care and or support provider organisations . Every provider working within property provided by the Association must meet the standards laid down in the Association's policy documents.

Providers currently working with the Association include:

- Cumbria Primary Care Trust
- The Oaklea Trust
- St Gregory's
- MENCAP
- Real Life Options



8 Funding

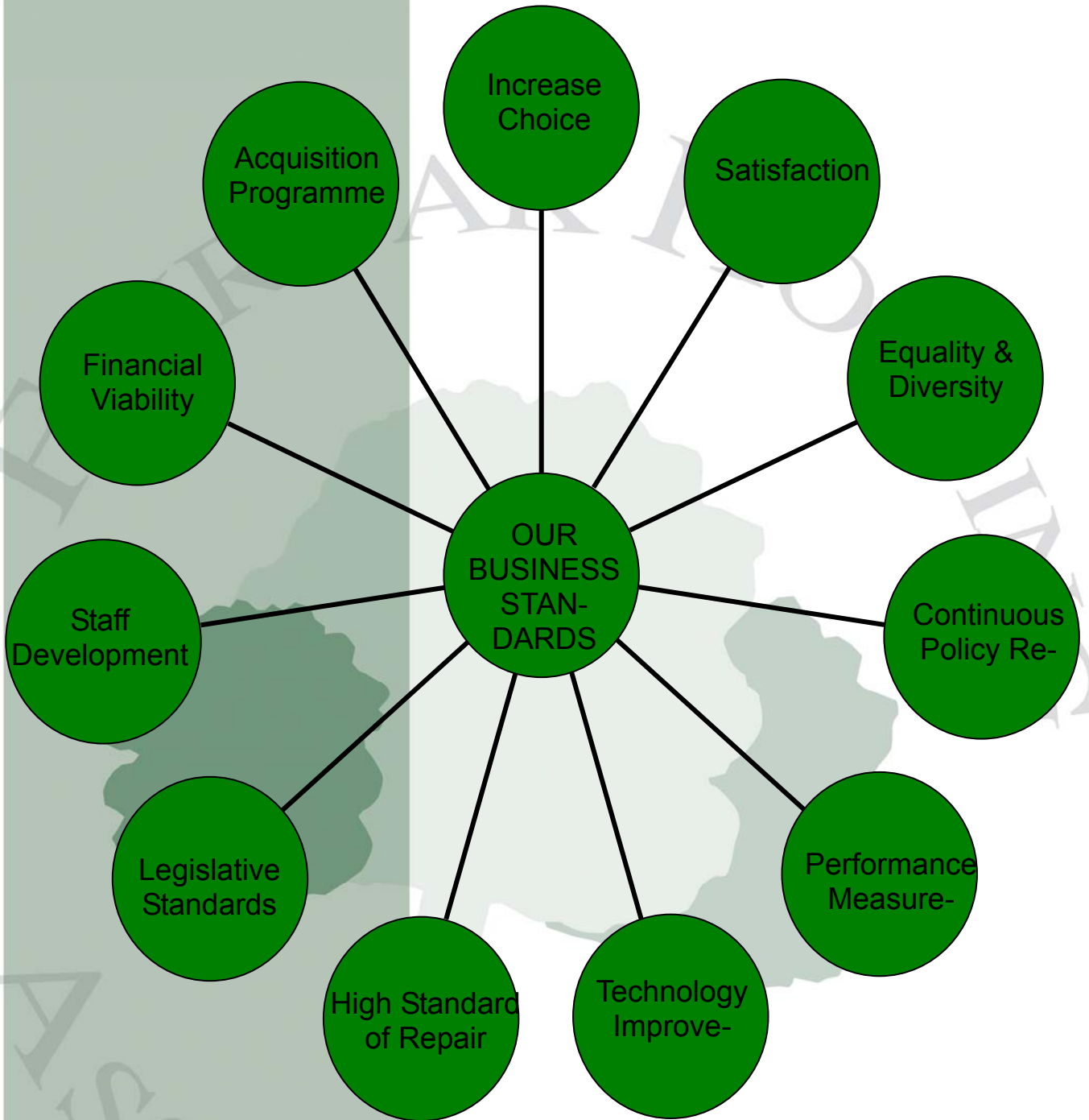
- 8.1 The Association sets its rental levels taking account of local market trends and achieves a fair rent taking account of the specialist nature of the accommodation being offered. Rents are primarily met through Housing Benefit or personal contributions dependent on the individual circumstances.
- 8.2 The Association has access to different types of capital funding streams to allow for new development, renovation/adaptation of property to meet the needs of our customers.
- 8.3 The Association receives a sum of money for maintenance and contract services from other landlords to whom we provide housing management.
- 8.4 The Association's expenditure is predominantly maintenance and salaries with provisions put aside to develop new opportunities for existing and future customers as identified in the financial accounts.
- 8.5 As a charitable organisation the Association welcomes donations and bequests that assist in the development of housing options.

9 Our Business Standards

The Association sets itself standards by which all our work is implemented and we carry out a continual process of appraisal against these standards to evaluate and reshape our business to ensure we are meeting our customers changing needs.

- We aim to increase the opportunity for our customers to live within accommodation of their choice.
- We continue to monitor the satisfaction of our customers ensuring that the service we provide meets their expectations.
- We will maintain equality and diversity throughout our business.
- We will continually review policies and procedures of the Association to ensure that our high standards are maintained.
- We measure the performance of the Association against recognised quality standards.
- We will review technological advances and implement them where appropriate to enhance the lifestyle of our customers.
- We ensure that all property owned or managed by the Association is kept in good repair.
- We will ensure that the Association complies with its obligations according to its contractual arrangements and legislative requirements.
- We aim to meet the Association's business objectives through the continuous development of its employees.

9 Our Business Standards



10 Review of Objectives 2004 - 2007

10.1 Further develop housing in Cumbria

Land was identified and the development was successfully included in South Lakeland District Council master plan for Ulverston; however the Local Authority strategy was revised during this period and the decision was therefore taken to withdraw from this initiative.

10.2 Expand housing options within County Durham

We have successfully completed a development of self contained flats in the county. We have also secured preferred provider status with Durham County Council following a successful tender process.

10.3 Expand housing options in Northumberland

The Association has been working closely with Northumberland County to develop a vision for the future. We have been invited to tender for housing related projects within the County and we are also working with a provider agency to develop new initiatives.

10.4 Palliative Care Development

Detailed proposals for palliative care options have been submitted to two counties and are currently awaiting feedback.

10.5 Owner/ Occupier & Shared Ownership Options

Research and development of shared ownership options has begun with the aim of this type of ownership being available to our customers in the near future.

11 Business Objectives 2007 — 2010

The Association has set itself the following objectives for the three year period 2007 to 2010:

- 11.1 Governance
To take forward Trustee (Director) development appraisals and to complete an induction handbook.
- 11.2 Cumbria
Develop further independent accommodation (flats) within the South Lakeland. This objective is driven by the Cumbria Housing Strategy 2006/2011 which refers to improving services for people with learning disabilities by “..expanding the range of housing care and support options” “planning for choice and respecting preferences of individuals” and “develop(ing) further floating support..”
- 11.3 Lancashire
Further build on existing partnerships within Lancashire County Council. This objective is driven by the close proximity of the area to our existing operations and consequent overlap of customer demand.
- 11.4 Durham
Develop further independent flats and houses within the County. This is driven by the demand we know to exist in the area both from customers and the local authority.
- 11.5 Northumberland
Work with partners to develop shared ownership accommodation within Northumberland and Continue to work with Northumberland County Council This is driven by specific demand from the County Council and successful tendering.
- 11.6 Stock Transfer
Work with other Housing Associations to expand the good work of the Association by considering joint working and stock transfer options to the Association.
- 11.7 Housing Corporation
Work towards registration with the Housing Corporation as an RSL. This objective is driven by the proposed increase in unit numbers through the development of the Association and the improvement in external quality benchmarking.
- 11.8 Palliative Care
To work on a speciality property design to provide palliative care for people with Learning Disabilities. This objective is carried forward from our previous business plan.
- 11.9 Funding Bids
To work with local authorities on future funding bids to develop housing initiatives and technological advances to support people with learning and other disabilities and specifically to work with County Durham Adult Social Care to develop and progress a

11 Business Objectives 2007 — 2010—cont.

11.10 Shared Ownership

To continue the research into this option of home ownership for people with disabilities and to develop a pilot project.

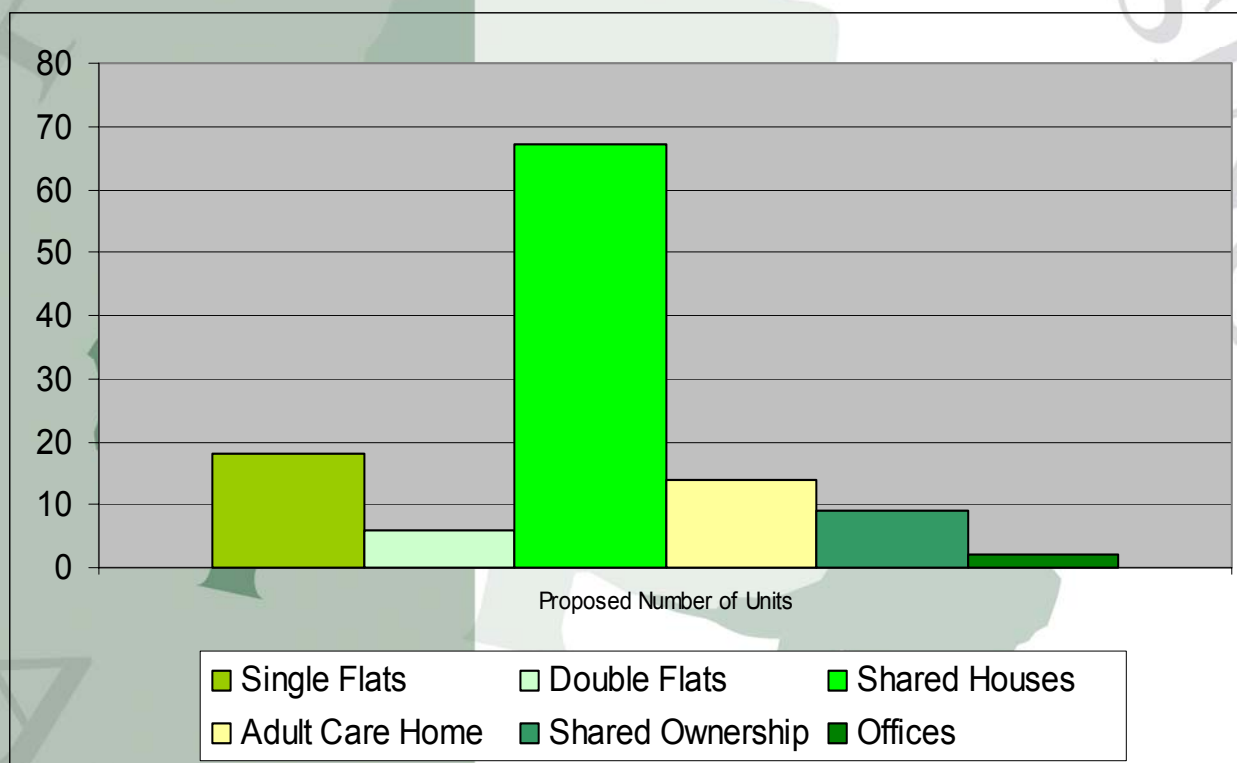
11.11 Customer Participation & Consultation

To further build upon our current consultation processes with customers and their representatives and to actively encourage customer participation. This objective has been derived by our ongoing commitment to improving customer satisfaction.

11.12 To benchmark the activities of the Association with like-minded organisation's and via the National Housing Federation

11.13 Housing Strategy

To continue to be a major stakeholder in the development of housing policy and strategy both locally and nationally.



Effect of proposed development on unit numbers:

12 Association Structure

12.1 The Association's Head Office is in Kendal, Cumbria.

12.2 The Association's organisational structure is:



There are seven members on the Board of Trustees, all of whom bring a range of skills and experience, when combined, compliments the Association. Their attributes include:

- Local government experience including corporate and special needs housing
- Voluntary experience in working with people with learning disabilities
- Teaching
- Successful fund raising experience
- Local MENCAP group membership
- Business management skills
- Corporate management experience
- Retail and marketing experience
- Property development
- Qualified accountancy
- Parents of children with disabilities

15 Quality Assurance

The Association is committed to provide quality services in all areas of its work through:

15.1 Landlord Inspection Visits

The purpose of these visits is to ensure that property maintenance is of a high standard and to keep our customers informed of planned maintenance. It also aids communication with tenants.

15.2 Board of Trustees Visits

Members of the Board of Trustees undertake quality visits to projects managed by the Association and report significant findings to the Board.

15.3 Consultation

The Association holds “open consultation events” as opportunities for our customers to discuss any issues with staff on a face to face basis and to encourage tenant participation and to assist the Association in meeting tenants requirements and desires. The Association also produces a newsletter and has a designated area of the website for customers. Annual satisfaction surveys are used to consult customers and stakeholders.

A representative of the Association also attends customer consultations held by partner agencies when appropriate.

15.4 Benchmarking

The Association is a member of the National Housing Federation and uses its membership to ensure we are keeping up to date with regulations and standards and using the Federations facilities to ensure we monitor our procedures against that of other similar organisations across the country.

16 Financial Information

The financial history of the Association is available through its audited accounts.

contact us

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WHAT OUR CUSTOMERS SAY

...

"Fair Oak have helped me build up trust and confidence and supported me to move on"

"I enjoy living at Langdale"

"(Fair Oak) have always come quickly to sort things out when they are broken"

"Many thanks for all your help"

"I received a lot of support and guidance especially over my move"

"I would like to express my thanks for all the hard work ... (to) help empower people with learning disabilities in making positive decisions about their future."

"I am happy with Fair Oak and the service they provide"