



## Nancy Oldfield Trust Strategic Plan 2018-2020

**Accessible sailing, cruising and canoeing  
on the Norfolk Broads**



**making adventure possible**

## **About this Strategic Plan**

In 2017 the Trust undertook an information gathering exercise to find out what our visitors, staff, volunteers, trustees and other interested parties think about the Trust, what they like about it and what they would like it to be in the future. The feedback from this process informs the following document which provides the strategy to 2020.

## **Background to the Strategic Plan**

### **What makes the Nancy Oldfield Trust special to our visitors today?**

The Nancy Oldfield Trust has been enabling disabled, disadvantaged and other visitors to experience and enjoy the Norfolk Broads for 34 years. The combination of the range of activities, our location, the facilities offered at our centre, friendly staff and volunteers and the fabulous Broads environment make the Trust unique in the UK and our visitors return year after year to enjoy what the Trust offers.

## **PEOPLE**

Visitors, staff and volunteers all combine to create the unique friendly atmosphere and feel of the Trust. The Trust is informal, non-institutional, non-judgemental and open to visitors, their families and friends. The Trust hosts around 5000 visits each year, with visitors having widely varying needs, challenges and desires. They are welcomed by a dedicated team of staff and volunteers who provide activities and experiences tailored to the requirements of our visitors.

## **BOATS**

The Trust, and our fleet of various boats, provide access to the stunning and unique environment of the Broads and all the activities that can be enjoyed, watched or undertaken by our visitors. Those people familiar with the Broads probably take them a little for granted. Imagine arriving at the Trust for the first time. You see a bungalow in familiar residential surroundings. Walk or wheel to the end of the garden and a whole new world of opportunity, possibility and fun becomes possible that to most people is well beyond the experience of their daily lives.

## **FACILITIES**

The Trust aims for the highest standards possible in the facilities offered to visitors. The bungalow is the Trust's single most valuable fixed asset and on-going improvement and maintenance keeps it as a well-appointed, welcoming and comfortable place to stay. As a self-catering destination we are aiming to provide high quality surroundings and equipment. Excellent facilities are appreciated by everybody. Our boats are kept in good condition and as with the bungalow are fixed assets that need to be maintained and kept up to date through judicious maintenance and replacement policies.

## **REPUTATION AND BRAND**

Although the Trust is a RYA Recognised Training Centre we are a visitor orientated organisation providing life enhancing and enrichment experiences. We aim to provide the best and most appropriate experiences possible for all our visitors in a sensitive and caring way. We are known for being 'The Nancy Oldfield Trust' and this identity is a

strong selling point for the Trust. Our role in providing accredited and nationally recognised training supports our wider goals.

### **ACTIVITIES**

The Trust promotes and provides a wide range of high quality water-based activities around our motor boats, yachts and canoes. We devise programmes to offer bird-watching, sensory or therapeutic experiences, photography, art, environmental education and other imaginative activities. We are open to new ideas and to the possibility of working in partnership with other local organisations based in and around the Broads. The Trust also promotes the attractions and opportunities available in our immediate area as part of the experience provided to our visitors.

### **STAFF**

We are fortunate to have an excellent multi-skilled team of paid staff and this is essential to the Trust's future. We aim to duplicate key training roles and qualifications amongst our staff to ensure business continuity as well as providing opportunities for professional development. The level of staffing, allocation of responsibilities and remuneration for those responsibilities are kept under regular review.

A professional core of dedicated paid staff is the key to ensuring proper oversight of all staff, volunteers and visitors on site at the Trust.

### **VOLUNTEERS**

We have a team of trained, committed, supportive and motivated volunteers who are essential for the Trust to fulfil our mission as a charity to enable visitors to enjoy the Broads. Without volunteers the Trust would cease to function. It is important to continue to develop and provide well thought out and thorough training programmes for all who support the Trust.

### **TRUSTEES**

We have engaged, supportive, knowledgeable and constructively critical Trustees who are vital to the effective functioning of the Trust. They set strategic direction, have oversight and overall responsibility for the organisation. Key functions such as fundraising, finance and marketing are undertaken by appropriately configured teams of Trustees, staff and volunteers with individuals having responsibility for agreed actions. This approach provides robustness to the Trust's operation and helps ensure effective business continuity when people retire or move on from volunteering or working for the Trust.

## **The Trust's Strategic Objectives - What do we plan to achieve in the next three years?**

**1 To stop being a 'best kept secret' and publicise ourselves effectively and through this increase public awareness of the Trust and bring new visitors to the Trust.**

**Actions** The Trust will support its marketing group comprising trustees, staff and volunteers to set out a clear plan for identifying opportunities to promote the Trust through the Trust newsletter, social media, the professional media, local, regional and national events and other opportunities which may present themselves. We will update our corporate image and ensure we have attractive, accessible and consistent information readily available across a wide range of formats. We will make more effective use of social media and conventional media outlets to achieve this aim.

**2 To ensure that we are a well-run and stable organisation that is financially robust.**

**Actions** The Trustees, treasurer, manager, finance assistant and staff will continue to fund raise by working with existing donors and grant providers and seek increased financial support from visitor and public donations, grants, legacies and other sources. We will seek new funding sources and will keep our suggested donation policy under review to balance the need for income with our wish to ensure that visitors consider our facilities to be accessible and affordable. We will promote the use of the bursary fund to support visits to the Trust by visitors lacking financial resources.

**3 To identify and attract new visitors, promoting the Changing Tack project and the powerful idea of 'Wellbeing on Water' to improve mental and physical health**

**Actions.** The manager, changing tack coordinator and marketing group will develop strategies to effectively market the Trust to identify potential visitors (such as those receiving palliative care) who would benefit from a visit to the Trust. We will particularly seek new visitors between November and March when we have spare capacity by developing imaginative packages such as therapeutic, artistic, relaxing or other activities. We will have a clear development plan for the changing tack project and for wellbeing on the water. We will develop partnerships with like-minded organisations where these will align with our goals.

**4 To become the 'go to' organisation in the Broads on matters concerning Broads boating for disabled and disadvantaged people.**

**Actions** The manager, administrative staff and changing tack coordinator will ensure we have a presence on appropriate Broads forums to represent the interests of disabled and disadvantaged visitors to the Broads as well as publicising the Trust. We will represent our visitors needs and aspirations. We will continue to work within the

Sailability family, to review and address how we promote ourselves through Sailability and other disability forums.

**5 To extend the locations we can offer by identifying a new motor cruiser operating mooring base to enable visitors to access our service independently via public transport.**

**Actions** The manager and deputy manager will engage the support of the Broads Authority and local community in achieving this aim. They will meet with potential interested parties to seek approval for a trial run of trips from an alternative local base from November 2018 to March 2019 with a view to a more permanent arrangement. They will carry out a feasibility study during November 2018 to consider a Norwich based venue for motor cruiser operation in future years.

**6 To implement the planning, specification, design and commissioning process for a new motor cruiser to a timeline agreed by trustees, management and fundraiser.**

**Actions** The manager, with support from volunteers and staff, will consult with all motor boat volunteers on the design features for the next cruiser as part of an inclusive design brief. He will research locally available designs and combine driver suggestions with specifications to avoid design flaws of our existing craft using the detailed working knowledge that professional staff have acquired. The design brief will be completed by November 2018. Tender documents will be prepared during winter 2018/spring 2019 followed by approaches to manufacturers linked to a funding strategy to be developed by the finance team.

**7 To identify areas where we could potentially improve or extend our activity provision.**

**Actions** The manager and staff will prepare a discussion paper for Trustees to consider in November 2018 on areas where possibilities lie for extension or improvement of provision. This will include improving our ability to assist wheelchair users on to our sailing boats in a dignified manner, exploring the possibility of taking wheelchairs on yachts, developing a volunteer team of trained canoeists to facilitate canoeing, establishing a team of appropriately trained and qualified fishing volunteers.

**8 To continue to invest in and develop the on-going training and professional development of staff and volunteers as trainers**

**Actions** The manager and staff will draw up a plan for Trustees to enable the Trust to provide in-house national body training from, for example, the Royal Yachting Association or Canoe England for staff and volunteers to obtain recognised RYA and

other national body qualifications. The plan will identify the training needs for all staff and volunteers for the next three years and identify the budget required to achieve this.

### **How will we know if we have achieved these objectives?**

By 2020:

- We will be widely recognised throughout the public and business communities as a worthy organisation to support financially and will have achieved greater influence within the various organisations associated with Broadland activities.
- We will have a modern, fully accessible and user-friendly facility with the identified major infrastructure projects completed.
- Visitors will have access to a variety of water craft according to their needs and aspirations regardless of any physical, emotional or economic challenge they may have.
- We will offer a clear programme of structured activities with identified aims to increase confidence and well-being for our visitors.
- We will have a fleet of well-maintained boats and will have commissioned a new electrically propelled cruiser, Maureen Kenyon 2 to replace our oldest cruiser with a planned delivery date.
- We will be offering an increased range of activities throughout the year that make greater use of our residential facilities and motor cruisers between November and March.
- We will be offering cruiser trips from at least one location in addition to Neatishead to meet the needs of our visitors as fully as possible.
- We will be in a robust financial position as demonstrated in our annual accounts.
- We will have a well-motivated, committed and happy staff of paid employees and a strong team of volunteers providing safe and enjoyable activities to all Trust visitors.