



Executive Summary of the Nancy Oldfield Trust Strategic Action Plan 2023

The Trust's well executed Strategic Plan has operated since 2018. Covid-19 has significantly changed what we all do, and it has therefore been updated.

With nearly forty years of operational experience and around 5,000 visits each year, the Trust remains in a strong position to continue to deliver special experiences for its users, increasing our residential and waterborne services following the pandemic. We have a small team of paid staff who have a wide range of skills and experience, along with a large and wonderful team of volunteers.

The Trust's Eight Strategic Objectives are:

- 1 To build brand awareness of Nancy Oldfield Trust among our existing users and friends and expand knowledge of our services to a broader base of new users and partners across the UK.
- 2 To ensure that we are a well-run and stable organisation that is financially robust.
- 3 To broaden our services to improve mental and physical health and identify new visitors who could benefit from such activities.
- 4 To continue to be the 'go to' organisation in the Broads on matters concerning Broads boating for disabled and disadvantaged people.
- 5 To commission special adaptations and upgrades to our fleet on the Norfolk Broads to enable all visitors, irrespective of their personal needs, to access our services.
- 6 To identify areas where we could potentially improve or extend our activity provision to maximise the use of our facilities for the benefit of more visitors.
- 7 To support our staff and volunteer team through regular training and professional development in all the skills that are needed to provide the best service for visitors, whilst promoting an inclusive "one team" approach at the Trust.
- 8 To help ensure the beauty of the Norfolk Broads is enhanced and protected for future generations by developing our sustainability policies and targets.

The following document provides more detail of our planned activities and actions which we expect to implement in order for The Nancy Oldfield Trust to continue to flourish.

About this Strategic Action Plan 2023 - 2028

The Trust's last Strategic Plan operated from 2018 and has been well executed, with excellent progress across all areas.

After the unprecedented impacts of the Coronavirus pandemic 2020/21 as we emerged into normal life again, it was clear that an updated Strategic Plan was needed to reflect changed conditions and the need to ensure stability of our services in the future. An overarching requirement of this plan is to ensure that any actions taken will be considered carefully in line with the capacity constraints that any small charity faces.

The Trust's resilience through the pandemic years was testament to the superb work that the whole team had done in the face of such unexpected disruption and uncertainty. It was also reflective of the actions taken over the previous thirty-nine years of its operation, to underpin the stability of the Trust, that meant we emerged from the pandemic in such a strong position to continue our operations. Our learnings from this experience has helped develop our refreshed strategy with an emphasis on continued stability.

In late 2022, the Trust commenced a new information gathering exercise to invite visitors, staff, volunteers, trustees and other interested parties to think about the Trust, inviting all parties to feedback on what they like about it and what they would like it to be in the future. In addition, a draft version of this plan was then shared more widely across all stakeholders to consolidate our thoughts and agreements into this refreshed Strategic Action Plan, designed to be valid for at least the next five years.

We considered whether to operate a "Strategic Plan" and a separate "Action plan", however we concluded that keeping both aspects together enables us to clearly review and progress towards our objectives on a regular basis.

Background to the 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 nearly forty years.



We believe that the Trust offers some very special opportunities through our range of water-based activities: our two residential properties and our wonderful team of staff and volunteers in the fabulous Norfolk Broads environment. Many of our visitors return year after year to enjoy everything the Trust offers.

We aim to be the primary destination in Norfolk for anyone who could benefit from the Trust's waterborne services, whilst bringing new visitors to the Trust's two residential locations.

Our Culture

Visitors, staff and volunteers all combine to create the unique friendly and welcoming feel of the Trust. The Trust is informal, non-institutional, non-judgemental and open to visitors, their families and friends.



The Trust hosts around five thousand visits each year, with visitors having widely varying needs, challenges and desires. They are welcomed by an enthusiastic and experienced team of staff and volunteers who provide activities and experiences which are tailored to each visitor's requirements.



The Boats : Our fleet of motorboats, canoes, paddle boards, pedal boats and sailing yachts 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.

Visitors arriving at the Trust's centre in the village of Neatishead for the first time see a pretty bungalow in a residential setting. When they move to the end of the garden where the boats live, a new world of opportunity and fun becomes possible that to most people is well beyond the experience of their daily lives.

Our boats are kept in excellent condition and are fixed assets that need to be maintained and kept up to date through regular maintenance and replacement policies.

The Facilities

Our bungalow on the Broads (known as Kenyon 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.



A recent donation to the Trust is a fully adapted, holiday cottage (known as Berwick Cottage) in the quaint Norfolk village of East Harling which provides a base for families with a wide range of specific needs to enjoy a break in beautiful rural Norfolk alongside an opportunity to experience our facilities on the Norfolk Broads.

With both of the self-catering residential destinations we are aiming to provide high quality surroundings and equipment.

Our Reputation and Brand

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.

The Activities

The Trust promotes and provides a wide range of high-quality water-based activities around our motorboats, yachts and canoes. These include programmes to offer wellbeing and mental health benefits. We intend to increase our provision of sensory and therapeutic experiences, photography, art, environmental education, bird watching 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 actively and proudly promotes the visitor attractions and opportunities available in our wider geographic area as part of the experience provided to our visitors.



Our staff

We have a small team of paid staff who have a wide range of skills and experience. A strong multi skilled team is essential to the Trust's future. We recognise that a professional core of experienced paid staff is the key to ensuring safe and proper oversight of all staff, volunteers and visitors on site at the Trust.

We aim to duplicate key 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.

Our Volunteers

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

Our 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, professional fundraising consultants 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.



1 To build brand awareness of Nancy Oldfield Trust among our existing users and friends and also expand knowledge of our services to a broader base of new users and partners across the UK.

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. We will do this through the Trust newsletter, social media, the professional media, local, regional and national events, partner organisations and other opportunities which may present themselves.

We will continue to review 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 the changing social media methods alongside conventional media outlets.

We will grow our online presence through partner organisations and complementary online websites to increase the visitor numbers to the Trust from across the UK.



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

Actions

Working alongside our independent fundraising consultant, we will seek new and ongoing funding sources.

We will continue to fundraise 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 keep our suggested donation policy under review annually to balance the need for income with our wish to ensure that visitors consider our facilities to be accessible and affordable.

We will increase our connections to professional partners locally to grow the potential for future legacy donations to help support the financial objectives of the Trust decades into the future.

We will promote the use of the bursary fund to encourage visits to the Trust by visitors requiring financial support.

3 To broaden our services to improve mental and physical health and identify new visitors who could benefit from such activities.

Actions.

We will develop projects to support individuals who feel lonely or isolated.

We will also aim to connect with other groups, for example, those receiving palliative care, who would benefit from visits to the Trust.



4 To continue to be the ‘go to’ organisation in the Broads on matters concerning Broads boating for disabled and disadvantaged people.

Actions

We 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.

We will ensure that our Trustee board continues to evolve to include representatives reflective of our users and volunteers.



5 To commission special adaptations and upgrades to our fleet on the Norfolk Broads to enable all visitors, irrespective of their personal needs, to access our services.

Actions

Recognise that the costs of any upgraded motor cruiser will be significant and explore all means to fund raise towards these costs alongside potential use of the Trust’s long term financial reserves.

Aim to deliver an additional, suitability specified, motor cruiser to our fleet in 2024.



6 To identify areas where we could potentially improve or extend our activity provision to maximise the use of our facilities for the benefit of more visitors.

Actions

We will particularly seek new visitors between November and March when we have spare capacity by promoting our residential facilities through complementary professional third party online booking websites. e.g., disabled holidays websites.

We will continue to explore an expansion of the water-based services at weekends where possible.

We will implement a more proactive outreach programme to more special needs schools and groups across Norfolk and Suffolk to ensure our services are more broadly known and available to potential core users.

We will implement a regular maintenance and improvement programme for our two residential facilities to ensure they remain in excellent condition which will help encourage greater utilisation by users.

7 To support our staff and volunteer team through regular training and professional development in all the skills that are needed to provide the best service for visitors, whilst promoting an inclusive “one team” approach at the Trust.

Actions

We will continue to maintain our relationships with the Royal Yachting Association (RYA) and the Adventure Activities Licensing Authority (AALA), through our membership, registration and ongoing active links and engagements. We will continue to follow and implement the multi-faceted requirements of both the RYA and AALA to ensure the ongoing safety of all staff, volunteers and users.

We will continue to seek regular feedback from our volunteers and users, to identify potential improvements, with more staff empowered decision making.

We will undertake more frequent volunteer training to ensure we maintain consistency of knowledge, competence and consistency of service across our growing volunteer group.

We will implement a more effective communication approach across our staff and volunteers to ensure we continue to grow the level of engagement across everyone involved with the Trust.

We will identify ways we can reach out to newly retired people who may be interested in getting involved with the Trust on a voluntary basis.

8 To help ensure the beauty of the Norfolk Broads is enhanced and protected for future generations by developing our sustainability policies and targets.

Actions

We will regularly review all activities to ensure that we are adopting as many environmentally sound practices as safely and practically allowed.

We will continue to improve our facilities to reduce our carbon footprint through greater user of alternative energy sources, both on land and on the water. For example, through the use of more solar power and conversion of fossil fuel engines to electric powered units.

We will aim to reduce waste in everything we do, with everyone involved with the trust encouraged to follow greater environmental thinking and actions.



How will we know if we have achieved these objectives?



By 2028:

We will be widely recognised throughout the public and business communities as a worthy organisation to support and be engaged with.

We will have contributed to and made links with other organisations associated with Broad's based activities and environmental protection.

We will have modern, fully accessible and user-friendly facilities with the additional fully adapted motor cruiser project completed.

Visitors will have access to a variety of watercraft 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 continue to be a Norfolk focussed organisation, but our visitor base will have grown to include more people from wider geographic locations across the UK.

We will be making greater use of our residential facilities and motor cruisers between November and March.

We will be in a robust financial position as demonstrated in our annual accounts.

We will continue to have a well-motivated, committed and happy staff team and a strong group of volunteers providing safe and enjoyable activities to all visitors.



The Nancy Oldfield Trust, Irstead Road, Neatishead, Norwich, NR12 8BJ