



Sutton Coldfield Charitable Trust

# Five year plan

Looking forward to 2028

# Contents

---

## Section one Overview 3

Introduction	4
Five year plan on a page	5
Understanding our values	6

## Section two Setting the scene – about SCCT 7

Inputs to the five year plan	8
A heritage for the future	9
Decade of transformation – 2012-2022	10
Sutton Coldfield Charitable Trust Today	11
Investment principles	14

## Section three Looking forward to 2028 – five aims 15

Our five aims	16
Aim 1: Almshouses research & assessment of future need	17
Aim 2: Grants programme expansion	19
Aim 3: Supporting heritage, green spaces and community	20
Aim 4: Being well run, efficient, accessible and inclusive	22
Aim 5: Good management of assets and their use	25

Activity timeline summary	26
Contact us	27

# Section one

## Overview

## Introduction

---

<b>Origins</b>	The origins of SCCT can be traced back to Tudor times, having improved the lives of generations of people in the Royal Town of Sutton Coldfield, particularly those in most need.
<b>Registered charity</b>	SCCT is a registered charity that has sustained its core priority to alleviate hardship and enhance the quality of life for residents of the Royal Town, while redefining and extending charitable benefits to reflect changing times.
<b>Strategic direction</b>	Our five year plan provides a strategic direction for the charity, looking forward to 2028 and beyond.
<b>Five aims</b>	Five aims support the <b>vision</b> of SCCT <b>to enhance the quality of life for all in Sutton Coldfield</b> . These five aims provide the basis for further assessment and financial appraisal in order to produce more detailed plans.
<b>Embedded priority</b>	Our commitment to equality, diversity and inclusion is embedded as a priority within all five aims.
<b>Regular theme</b>	Continued learning as to how we may make a positive environmental contribution is a regular theme throughout the five year plan.
<b>Looking forward to 2028</b>	The year 2028 is a milestone anniversary for both SCCT and the town, being 500 years since the origins of SCCT and the Royal Charter that decreed Sutton Coldfield a Royal Town.
<b>Long term approach</b>	Whilst 5 years is considered realistic for planning purposes, a feature of SCCT is the long-term approach taken in relation to its endowment assets. The permanent endowment assets are the land, property and financial portfolio held in trust as the heritage of SCCT. Many investment decisions provide returns in future decades or potentially much longer into the future.
<b>Income for charitable purposes</b>	SCCT income is used to support our two charitable purposes: To alleviate hardship and improve the quality of life for residents of the Royal Town of Sutton Coldfield through <ul style="list-style-type: none"><li>• <b>The provision of housing</b></li><li>• <b>Grant awards to support individuals &amp; community organisations</b></li></ul>
<b>Finance and risk</b>	A finance, feasibility and risk appraisal will be conducted for any plans requiring significant change.
<b>First phase of the plan</b>	The first phase of the plan will focus on assessing the feasibility of the five aims. This will involve exploring the options and examining the financial and risk implications required for producing the detailed plans for delivery of our charitable purposes.

## Five year plan on a page

---

<b>Vision</b>	The vision of Sutton Coldfield Charitable Trust is to enhance the quality of life for all in Sutton Coldfield
<b>Mission: charitable purposes</b>	SCCT aims to alleviate hardship and improve the quality of life for residents of the Royal Town of Sutton Coldfield through <b>the provision of housing</b> and <b>grant awards to support individuals &amp; community organisations</b>
<b>Values</b>	We strive to be Responsible Inclusive Caring Transparent Sustainable
<b>Five aims</b>	<ol style="list-style-type: none"><li><b>1. Almshouses research and assessment of future need</b> Research the need for another SCCT housing scheme</li><li><b>2. Grants programme expansion</b> Review the grants programme and level of grants awarded</li><li><b>3. Supporting heritage, green spaces &amp; community</b> Continue to liaise and consider suitability of initiatives to support</li><li><b>4. Being well run, efficient, accessible and inclusive</b> Do what we do better for more people with best use of resources</li><li><b>5. Good management of assets and their use</b> Manage our assets well and their community &amp; ecological impact</li></ol>
<b>Embedded priority: EDI</b>	Equality, diversity and inclusion will be part of the fabric of SCCT and all that we do - an embedded priority within all five aims.
<b>Regular theme: Eco-options</b>	Ongoing exploration and learning as to how we may make a positive environmental contribution is a regular theme throughout our five year plan.
<b>An appraisal of finance, feasibility and risk will be conducted</b> for projects and plans requiring significant change	

## Understanding our values

---

### **Responsible**

Being responsible applies to all matters including being a good employer, caring for the environment, protecting our assets and acting with good governance.

### **Inclusive**

Being inclusive relates to our operations, beneficiaries, staff and all those we work with; embracing equality, diversity and inclusion.

### **Caring**

Caring reflects the helping nature of SCCT and its core purposes.

### **Transparent**

Being transparent demonstrates our commitment to openness and sharing.

### **Sustainable**

Striving for sustainability reflects longevity and aims to ensure SCCT continues to make a lasting contribution and remain in good shape for centuries ahead.

# Section two

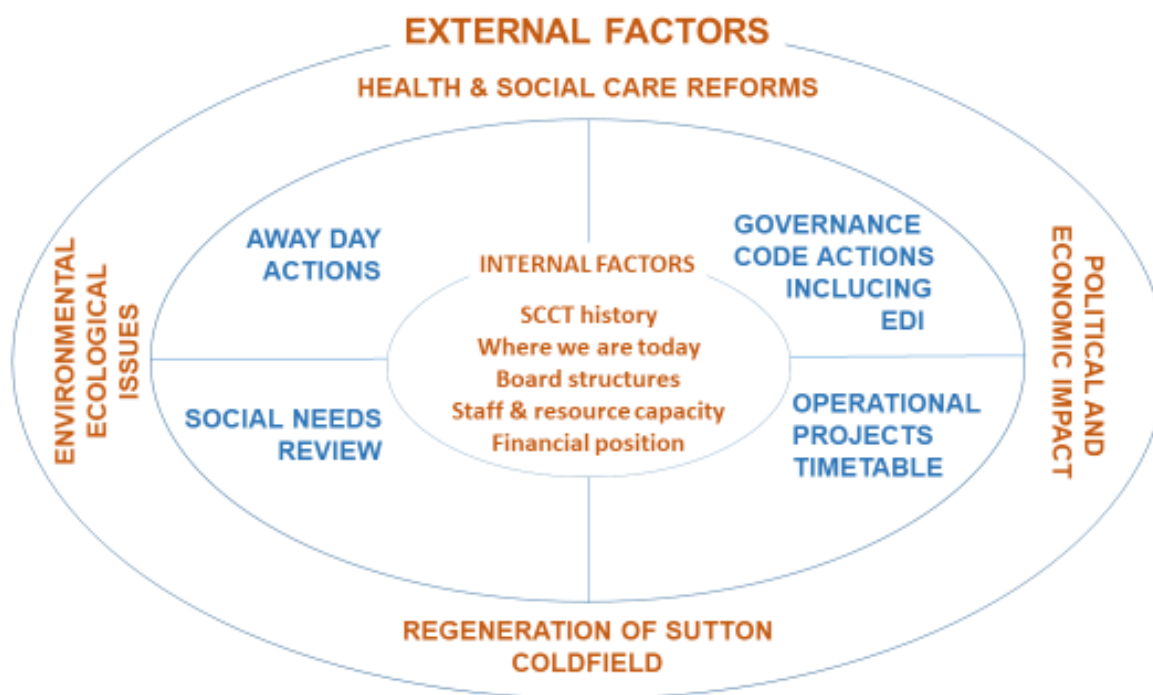
Setting the scene

about SCCT

## Inputs to the five year plan

The five year plan has been informed by a range of sources as illustrated in **Figure 1**.

**Figure 1 – Inputs to the five year plan**



The report “Revisiting the Social Needs of Sutton Coldfield” (referred to as the Social Needs Review) was conducted by University of Birmingham (novated to University of Nottingham<sup>1</sup>) on behalf of SCCT. The research spanned from November 2019 to February 2021. The findings represent the views of the researchers, and not necessarily those of SCCT, as the potential ambitions presented in the report are not all within the scope of SCCT’s charitable objectives. Therefore, the report summary is already being discussed in collaboration with local agencies. A number of the actions within the five year plan have been guided by the evidence gathered in the research.

In addition, the five year plan is based upon a depth of experience in relation to SCCT’s core purposes, that is, the provision of 46 almshouses and awarding of grants. Grants awarded are currently categorised as eight existing pillars of support and advancement:

### Grant categories: pillars of support and advancement for grant awards

Relief of need	Education	Arts & culture	Religion	Health	The community	Amateur sport	The environment
----------------	-----------	----------------	----------	--------	---------------	---------------	-----------------

<sup>1</sup> The contract novated when the lead researcher changed job role and moved to the University of Nottingham



## A heritage for the future

In order to understand how SCCT's heritage has shaped the charity as we know it today, the historical timeline charts the past centuries and the resulting future milestones approaching.

### SCCT historical timeline

### Future milestones

– 1528	Bishop Vesey, of Sutton Coldfield persuaded Henry VIII to grant a Charter in 1528 establishing a Warden and Society (Corporation) to govern the Town. The Corporation was obliged to use rental and other income to relieve poverty and improve the locality. Through a Royal Charter, Sutton Coldfield was decreed a Royal Town.	2028 500 year heritage alongside the origins of the Royal Town
– 1707	Thomas Jesson, a local merchant, died leaving land and money to provide apprenticeships for boys and to distribute bread to people in poverty. This Charity was administered by the Corporation and it was later absorbed into the Municipal Charities which ultimately became SCCT as it is today.	2027 320 years since this landmark endowment
– 1825	After a long and pivotal legal action the Corporation's charities were reorganised and enriched by the lands acquired in the 1825 Enclosure Award. From this time, almshouses were built and the Trust provided elementary schools (including teaching and uniforms) for Sutton's children. Practical necessities, such as coal, blankets and boots were widely distributed. In pre-welfare state days, the charities financed nursing and medical care for people in need and made grants to widows. Much of SCCT's work can be traced back to this date.	2025 200 years since the pivotal Court of Chancery Settlement
– 1886 to 1898	The Town became a Borough and in 1898 Sutton Coldfield Municipal Charities was set up to take the Corporation and all the various related charities within one body. This operated closely alongside the Council and was administered by the Town Clerks. New almshouses were built, including two in the 1890s from a bequest by Frances Lingard.	2028 130 years since the Trust was formed
– 1974	At the time Sutton Coldfield became part of Birmingham, the independence of the Trust was safeguarded, ensuring the continuing provision of benefits for individuals and organisations within the former Borough boundaries. Although the separate historic charities have been consolidated into one charity the Trustees' fundamental aims and priorities are still very similar to those pursued by Bishop Vesey and his successors over nearly five centuries.	2024 50 years since the Trust gained independence
– 2012	The name of the organisation was changed to Sutton Coldfield Charitable Trust to more appropriately reflect the Trust's role within the town as an independent charity.	Oct 2022 10 years in our current name

## Decade of transformation – 2012-2022

---

October 2022 marked 10 years of SCCT operating under its current name, which more accurately reflected SCCT's role as an independent charity. This was a decade of national and global transformation. The period was also significant for the Royal Town, as Sutton Coldfield established its own Town Council during this time.

### **Charitable benefit**

In the 10 years from October 2012, SCCT responded to 971 grant applications plus 3,100 school uniform grants, awarding a total £11.8m in grants to organisations, individuals and families. Every year, during this time up to 50 residents, including some couples, have enjoyed living in the almshouse community at Lingard House, Walmley.

### **Demographic change**

The 2021 census will identify the demographic changes during the decade. This data is expected during the winter of 2022/3, shortly after publishing this five year plan.

### **Pivotal events – transforming public attitude and legislation**

Brexit, the Covid-19 pandemic, withdrawal of troops from Afghanistan and the Russian invasion of Ukraine are some of the events that have led to systemic change. The latter half of 2022 saw the most rapid level of inflation post-millennium, an escalating fuel crisis, and ongoing detrimental mental health across all age groups following isolation in the pandemic.

There have been milestone shifts in society such as legalisation of same-sex marriage, the ascent of Black Lives Matter, the #MeToo movement, plus a raft of investigations into matters relating to abuse and systemic racism. These societal shifts have led to a wave of reform.

### **Technology, data and social media**

The level of social change has been accelerated by the pace of technology, social media and artificial intelligence, resulting in the ability to swiftly reach and influence global audiences. Digital communication has transformed the way people connect and how information is gathered. The pervasion of social media into people's personal lives has also been the cause of serious harassment and harm.

### **Climate change**

In 2016, the world deal on climate change, dubbed the Paris Agreement, put in place international treaty deals relating to greenhouse gas emissions. UN Climate Change Conferences of Parties (COP) had been held for over 20 years prior to this; the first to be held in the UK was COP26 in Glasgow in 2021.

### **Political turmoil and constitutional transition**

The national political backdrop has been turbulent with successive Prime Ministers serving relatively short terms in office. Most profoundly, the death of Her Majesty, Queen Elizabeth II (the longest serving British monarch in history) and the succession of King Charles III has been the most symbolic constitutional transition of the century.

### **Sutton Coldfield sustainable urban extension**

In the decade ahead, "the Langley Sustainable Urban Extension<sup>2</sup> in the Royal Town of Sutton Coldfield will be one of the largest single residential developments in the UK. It will become a cornerstone of the City's inclusive growth plans" *Birmingham City Council, 2019, The Birmingham Plan 2031*. By 2028, the momentum will have gathered pace towards increasing the population of the Royal Town by around 5%.

### **An era of kindness**

A notable feature of the decade has been the way in which communities and the nation have mobilised unified support, kindness and hope during national hardship and mourning.

---

<sup>2</sup> Also referred to as Langley SUE

## Sutton Coldfield Charitable Trust today

---

SCCT is governed by a Board of Trustees. The Charity is not incorporated and is governed by a Scheme approved by the Charity Commission.

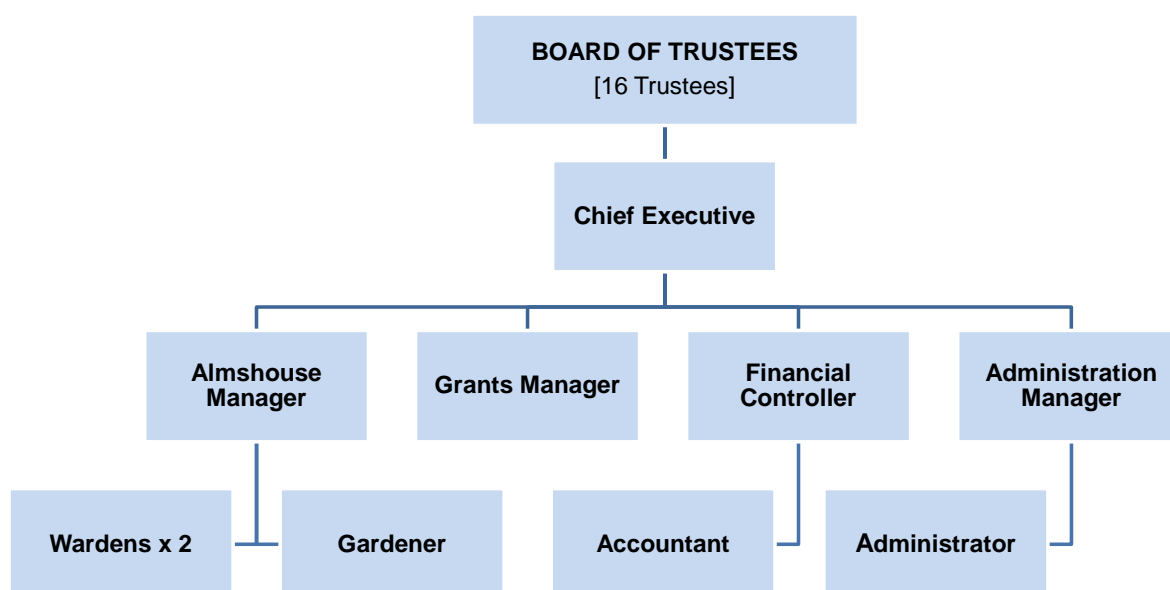
A governance framework is in place with a committee structure to ensure Trustees have visibility and involvement in overseeing risk, monitoring the performance of the charity, and making effective decisions. The operational delivery of SCCT's charitable objectives is in accordance with the Scheme as its governing document.

In addition, there is well established practice, over many years, of SCCT reviewing its governance both internally and externally and putting in place action plans to improve Board and organisational performance. This takes account of recommended standards including the charity governance code and Standards of Almshouse Management.

The Chief Executive is directly accountable to the Board of Trustees for the operational management of the charity, and works with the staff and the Board to maintain a strategic direction, good governance and effective delivery of SCCT's charitable benefits.

The current staffing structure is set out in **Figure 2** below:

**Figure 2 – Staffing structure as at 1 January 2023**



### Financial position

The financial year, for SCCT, runs from 1 October to 30 September. The total value of SCCT's assets, as at 30 September 2022 was around £72.1m, including unrestricted funds of £8.4m. The endowment assets are largely held in a portfolio of agricultural land, commercial (plus some residential) property, and financial investments. Specialist advisors support staff and Trustees in management of the assets.

SCCT's income during the year ended 30 September 2022 was around £2.3m. However, in order to sustain the level of grants awarded at around £1m per year, and recognising the level

of unrestricted reserves, Trustees have opted to budget for an operational deficit, for the short term, drawing upon the unrestricted funds to make up the balance. Advice is being sought to consider whether to apply what is known as the Total Return approach, which, if approved, will allow some of the increases in endowment value to be used for grants.

## **Technology**

Since the onset of the pandemic, staff have adopted new working practices, technologies and communication to facilitate home working for the ongoing management of SCCT and delivery of charitable purposes during periods of social isolation and ongoing agile working.

An IT review was initiated in 2022 to set up more efficient digital systems and equipment, including on-line Board reporting software. Future plans include streamlining grants and property systems and processes.

## **Proactive charitable response**

The effect of the pandemic on many individuals and community organisations was both extreme and adverse. SCCT responded proactively through its grants processes, including a Sutton Coldfield Together collaboration with the Town Council and other charities. Similarly, SCCT's almshouse residents were supported through safe daily contacts from wardens during the pandemic and upon returning to onsite social gatherings, activities and events.

Whilst the latest Public Health profile for Sutton Coldfield (2018/2019) was pre-pandemic<sup>3</sup>, the data illustrates a greater density of population drawing a pension, compared to the rest of Birmingham. The data also identifies pockets of deprivation scattered across all Sutton Coldfield wards. This latter evidence is further illustrated in the Index of Multiple Deprivation for Sutton Coldfield (2019)<sup>4</sup> also showing a high number of single households. Therefore, issues relating to poverty, loneliness and older age, that have already been a feature of the grants programme, are likely to continue to be prevalent.

Reviews also indicate the possible need for housing schemes that respond to a wider range of charitable purposes in addition to the current almshouse model. As such, SCCT is starting to explore the suitability of repurposing existing assets, or the feasibility of building a new housing scheme to meet a potentially more diverse range of residents.

Local schools have reported a rise in children's mental health crises and, along with local service providers, have highlighted the need for access to sporting and leisure facilities for people who are currently either excluded or not engaged in sport.

In response to changing need, Trustees continue to review the strategic approach to grants.

## **Marketing and communications**

Over more recent years, SCCT has worked with marketing and communications agencies to increase awareness of SCCT and improve inclusion relating to its charitable purposes. This has included implementing on-line communication via social media for the first time for SCCT.

## **Social need**

In addition to the Social Needs Review commissioned by SCCT, other local agencies are conducting ongoing reviews of the social needs of the Royal Town.

---

<sup>3</sup> [Sutton Coldfield | Birmingham City Council](#)

<sup>4</sup> Birmingham City Council Director of Public Health Annual Report 2021 (page 57).

SCCT is collaborating with these agencies to share review findings with each other to better inform local health, social and wellbeing priorities. This includes bringing together the various local information directories of support and facilities across Sutton Coldfield into a more accessible format for residents.

### **Equality, diversity and inclusion**

SCCT is committed to equality, diversity and inclusion (EDI) as part of the fabric of SCCT, with the aim that EDI permeates our culture and objectives, and is paramount in all policy and decision making. During 2021 and 2022, staff and Trustees participated in EDI training from which actions were put in place and incorporated into the governance action plan. EDI will be a consideration within all project plans and is an embedded priority throughout all five aims of the five year plan.

### **Exploring eco-options**

SCCT staff and Trustees are starting to explore and learn about how SCCT may make a more consistent and positive environmental impact. Therefore, the exploration of eco-options is a regular theme throughout the five year plan.

### **The next 5 years**

In response to the plans for regeneration of the Town Centre and new housing at Langley SUE, SCCT has already put in place some of the foundations that will support organisational growth. This includes preparing for significant financial receipts from land sales, local population expansion and a greater diversity of need in the years ahead.

The investment principles, overleaf, set out how SCCT Trustees intend to reinvest those financial receipts from land sales both to preserve and grow the charity's endowment as well as maximise the charitable benefit from endowment assets.

Section three sets out the five aims, agreed by the Board of Trustees, in preparation for these major changes leading up to and beyond 2028.

In years 1-2 of the five year plan, there will be a focus on assessing the finance, feasibility and risk of those five aims in order that Trustees may make the informed decisions required to put in place corresponding delivery plans.

## Investment principles

---

SCCT owns around 1,000 acres of land, of which approximately 83 acres forms a small part of the Langley SUE area. The whole of Langley SUE is allocated for the development of (at the time of writing) up to 5,500 homes. The 83 acres form part of SCCT's endowment.

The proceeds should be significant, although exact amounts and timing will depend upon many external factors outside the control of SCCT.

Trustees have adopted the following principles in readiness for investment of the financial receipts:

Investment principles for land sale endowment receipts	
<b>Reinvest 1/3</b> in land to replace acreage sold	Lead: Property Committee
	In addition to replacing the acreage sold, we will also explore options for use of that land whilst it is fallow
<b>Reinvest 1/3</b> in land and property for charitable benefit	Lead: Property Committee Almshouse Committee
	Whilst SCCT will maintain asset ownership, it may be that another agency runs the project or scheme
<b>Reinvest 1/3</b> in financial investments to provide modest income for grants	Lead: Finance Committee
	Stocks, shares and other income generating assets will be used to generate funds to expand the grants programme
Financial and legal guidance is also being sought to ensure maximum charitable benefit is achieved from the endowment asset base. This includes consideration being given to the 'Total Return' approach.	

These investment principles demonstrate the commitment of SCCT Trustees to maximising assets for charitable benefit as well as growing the endowment for the long-term future.

The extent to which [our five aims](#) may be delivered is dependent upon the timing of these financial receipts.

Whilst modest income for grants is expected from the additional investment into the financial portfolio, the grants budget available will remain under the pressure of rising cost-of-living as well as anticipated growth in demand.

# Section three

Looking forward to 2028

five aims

## Our five aims

Five aims set a direction for SCCT, looking forward to 2028, as a basis for more detailed planning, financial assessment and feasibility of achieving the intended outcomes.

### 1. Almshouses research & assessment of future need

#### **Research the need for another SCCT housing scheme to:**

- Better understand the growing demand for homes for older people.
- Better understand the potential need for a housing scheme for wider charitable purposes.
- Identify the diverse profile of potential beneficiaries and future requirements.
- Assess the suitability of repurposing existing SCCT assets or the feasibility of building a new scheme, both potentially serving a broader range of beneficiaries and needs.

### 2. Grants programme expansion

#### **Review the grants programme and level of grants awarded,**

towards a more proactive, accessible grants programme, including ongoing support for:

- Opportunities to inspire people into sport and improve access for all ages and abilities.
- Employment, training and apprenticeship initiatives.
- Improved access to welfare guidance and financial literacy.
- Initiatives to avoid crises such as relating to mental health; domestic abuse; and threat of homelessness.

Improved assessment and reporting of the impact of grants awarded will help to achieve the best charitable benefit from the distributed funds.

### 3. Supporting heritage, green spaces and community

#### **Continue to liaise and consider the suitability of initiatives for SCCT to support.**

This may include looking at related projects already in development in the town:

- Progression towards a heritage repository/education facility that may also attract visitors.
- Investment in the infrastructure across Sutton Park and associated leisure facilities.
- A more co-ordinated network of community centres to meet a range of social needs.

In time, for example, this may lead to SCCT owning landmark or strategically positioned property as a long-term asset that may provide a community purpose.

### 4. Being well run, efficient, accessible and inclusive

#### **Do what we do better for more people with best use of resources.**

- Use what we have better; with more streamlined, digital and efficient processes.
- Become better known – more accessible and inclusive – a great place to work.
- Model the rolling five year SCCT financial plan to test and support resulting projects.

### 5. Good management of assets and their use

#### **Manage our assets well and consider their community & ecological impact.**

- Improve management of SCCT woodland.
- Replace land sold for Langley SUE.
- Consider alternative and more sustainable uses for SCCT land and property.

Embedded priority running through the five aims

#### **Equality, diversity and inclusion**

EDI will be part of the fabric of SCCT and permeate our culture and all that we do

Regular theme throughout the five year plan

#### **Exploring eco-options**

Learning how we may make a positive environmental contribution

**Finance, feasibility & risk appraisal** of projects & plans requiring significant change



## Aim 1: Almshouses research & assessment of future need

---

### **Research the need for another SCCT housing scheme**

Almshouses are a charitable form of self-sufficient, low cost community housing that is held in trust for local people in housing need. They are managed and run by almshouse charities.

Today, 36,000 people in the UK are living full and independent lives in almshouses, finding friendships, wellbeing, safety and security within their homes and communities.

The Almshouse Association is a support charity representing over 1600 independent almshouse charities across the UK.

The Association has produced the Standards of Almshouse Management against which SCCT conducts self-assessments.

### **Research into local housing needs**

SCCT will research the need for homes relating to a wider cohort of potential beneficiaries in Sutton Coldfield. This may mean exploring other housing models for specific needs.

### **Review of existing SCCT land and property for housing purposes**

The research will include the feasibility of repurposing existing property and assets as well as whether the best use is being made of our current almshouse site and other properties.

The research will also aim to assess the suitability of investment in the development of a new housing scheme. Such a scheme may require selection of a potential delivery partner.

A collaborative approach is anticipated such as with the Town Council, housing providers and specialist service providers.

Research and planning will need to take account of decarbonisation technologies, such as renewable energy and insulation for homes, green approaches to transport and travel, and sustainable new build methods. We will explore how sustainable approaches may benefit our existing almshouses or improve use of existing land.

### **Housing scheme plan and development**

By 2028, it is anticipated that plans will have commenced for any adaptation of existing property or a new build to provide a bespoke housing scheme to meet identified needs.

## 1: ALMSHOUSES RESEARCH & ASSESSMENT OF FUTURE NEED

Project	Assessment of current and future housing needs in Sutton Coldfield. Feasibility study to assess use of SCCT existing land and property.	
Lead Committee	Almshouse Committee	Property Committee
Actions – Years 1-2		Intended outcomes
Factors to research		Clarification on whether the use and capacity of SCCT property is being optimised for provision of homes for existing and potential beneficiaries.
<ul style="list-style-type: none"><li>• The number of potential beneficiaries in Sutton Coldfield.</li><li>• Review of the different potential user groups and needs analysis of each.</li><li>• The number of residential units available for accommodation in the area.</li><li>• The nature and suitability of the available accommodation (for instance, apartments, bedsits, larger homes, etc).</li><li>• The potential alternative use of SCCT fallow land or existing buildings.</li><li>• The effectiveness of current use of existing almshouse site.</li></ul>		Improved understanding of the current and future housing needs of the Town to determine what facilities may be required and what SCCT can do to support these needs.
		Plan produced for the improvement and/or expansion of SCCT housing provision.
Actions – Years 3-5		
Design and development phase		Design agreed
Actions – Years 5-8		
Redevelopment plans in place and initiated for repurposing an existing SCCT asset (and/or reinvestment in a new asset for community benefit).		Plans agreed and implemented to meet community need and better utilise SCCT assets.
Equality, diversity and inclusion	Consider any potentially overlooked groups within the research phase. Consider adaptations required to support beneficiary access and living requirements.	
Exploring eco-options	Research and identify eco-options to implement for SCCT residential and non-residential properties, whether related to renewable energy; green energy for transport; retrofitting existing property; or new builds.	
What is required to commence the project		
Resource and expertise to scope the brief and research project plan. Resource assessment to deliver the research and feasibility study. Resource planning/procurement of specialist advisors for longer-term work programmes. <b>Finance, feasibility &amp; risk appraisal</b> of projects & plans requiring significant change.		

## Aim 2: Grants programme expansion

### Review the grants programme and level of grants awarded

SCCT continues to provide 8 categories of grant awards, known as pillars of support and advancement ([see Inputs to the five year plan, page 8](#)). The actions below have been prioritised to further identify services currently available, where there are gaps, and how SCCT may help, particularly in relation to inclusion of marginalised groups.

#### 2: GRANTS PROGRAMME EXPANSION

Project	Expansion and promotion of the Grants Programme, together with robust evaluation processes to determine the impact.
Lead Committee	Grants Committee

Actions – years 1-2	Intended outcomes
<b>Review grants &amp; monitoring processes</b> , including how grants are assessed and how to group grant categories.	More equitable, informed decision making for grants.
<b>Access &amp; inspiration into sport:</b> Support initiatives that inspire people into sport and improve access for all ages and abilities. Require applications to demonstrate inclusion.	More people are included and active.
<b>Access to employment:</b> Continue to explore support to employment, training and apprenticeship initiatives.	People within all pockets of poverty across the Royal Town are reached and able to thrive beyond simply surviving.
<b>Welfare &amp; financial guidance:</b> Liaise with schools and other agencies to support access to advice and financial literacy. Include affluent areas where help may be lacking.	Improved holistic support throughout the town, that relates to the progress of a more co-ordinated network of Community Centres (see aim 3).
<b>Homelessness:</b> Whilst addressing homelessness is a statutory responsibility, there will continue to be circumstances where SCCT awards grants to organisations that support people in relation to homelessness.	The views of residents and community organisations are heard and acted upon.
Actions – years 1-5	
<b>Mental health and isolation:</b> Continue to find ways to support initiatives that enhance mental health and wellbeing for all ages, parents and carers, including initiatives that involve communities and reduce loneliness.	
<b>Domestic abuse:</b> Gain knowledge of local provision relating to domestic abuse and how SCCT may help.	
<b>Community conference:</b> Consider a joint conference to bring agencies together to share findings of all studies relating to the needs of Sutton Coldfield residents.	

Equality, diversity and inclusion	Ensure a whole-town approach to meeting need as there are pockets of poverty and exclusion in all wards. Require all grant applications to demonstrate inclusion.
Exploring eco-options	Continue to support the advancement of environmental protection or improvement as a grant category, with additional awareness.

#### What is required to commence the project

Determine the level of grants budget available.  
Remodelling of the five-year financial plan in order to reflect an updated grants strategy.  
**Finance, feasibility & risk appraisal** of projects & plans requiring significant change.

## Aim 3: Supporting heritage, green spaces and community

---

### **Continue to liaise and consider the suitability of initiatives for SCCT to support**

SCCT continues to consider suitable projects relating to heritage, leisure and community facilities in the Royal Town. A number of heritage, leisure and community initiatives are set out in the Sutton Coldfield Town Centre Masterplan (2020) and the Sutton Coldfield Health & Wellbeing Strategy (in progress). At the point of writing the five year plan it was too early to assess which may be suitable for support from SCCT and in what form that support may take.

### **Heritage**

The Sutton Coldfield Town Centre Masterplan sets out the ambition to develop a Heritage Centre for the Royal Town, driven by the Town Council and potentially using assets within the Town Centre to accommodate a repository for heritage documents and artefacts. This aims to be part of a wider brief on heritage relating to education and potential visitor attraction and experience. SCCT remains open to considering suitable opportunities as they arise in relation to supporting the Heritage Centre plans as they emerge and progress.

### **Green spaces**

Sutton Park is a key leisure destination for residents and visitors. Sutton Park is a 2,400 acre National Nature Reserve that has been designated as a Scheduled Ancient Monument and a Site of Special Scientific Interest. Located adjacent to the Town Centre, it is one of the largest urban parks in Europe. The role of SCCT will depend upon local arrangements such as the control, management and future plans for the park. There will be continued opportunities for SCCT to contribute to the enhancement of other green spaces as improvement of leisure destinations and facilities is already incorporated into the SCCT grants programme.

### **Community**

There is a shared vision across agencies in Sutton Coldfield for a network of community centres to provide better access to welfare advice and guidance. There are currently at least 6 existing community hubs operating across Sutton Coldfield, in addition to a range of venues in church halls, faith centres and community cafes (see table 1 overleaf).

As part of the Sutton Coldfield Health & Wellbeing Strategy, many of these venues have been identified as offering multiple activities with regular footfall. The Town Council is working with residents and providers to create a more coordinated network of support that will meet as wide a range of local needs as possible.

### **The role of SCCT**

Continued exploration and liaison with relevant agencies, will help to identify any improvement programmes that may be suitable for SCCT to support, whether this would involve repurposing existing assets for community use, investing in new assets for that purpose, or through grants.

**Table 1: Community centres and venues** (other venues will also exist)

Ward & Venue	Ward & Venue
<b>Sutton Trinity</b> Trinity Centre Sutton Coldfield United Reform Church Sutton Coldfield Baptist Church Town Hall Our Place Duke Street Church	<b>Vesey</b> Age Concern Banners Gate Community Hall Newman Centre (Boldmere) St Michael's Church
<b>Walmley &amp; Minworth</b> St John's Church Walmley Centre St George's Church	<b>Four Oaks</b> Four Oaks Methodist Church All Saints Church
<b>Wylde Green</b> Wylde Green Centre	<b>Mere Green</b> Mere Green Community Centre Ark Community Church (Hope Food North) St James Church
<b>Reddicap</b> Falcon Lodge Hub	<b>Roughley</b> Harvest Fields Centre Four Oaks Baptist Church

### 3: SUPPORTING HERITAGE, GREEN SPACES & COMMUNITY

Project	Continued consideration of SCCT's role with initiatives as they develop, maintaining regular liaison with relevant agencies.	
Lead Committee	Property Committee	Grants Committee
Actions – Years 1-5		Intended outcomes
Continue to liaise with the Town Council about plans for a heritage centre as a repository for artefacts, educational facility and/or visitor experience.		Components of the heritage centre concept are delivered.
Actions – Years 3-5		
Consider making a significant contribution to the infrastructure of Sutton Park if the opportunity arises and if suitable arrangements are in place.		Aspects of plans to improve Sutton Park are delivered. Benefits enjoyed by Sutton Coldfield residents and visitors.
Support the concept of a co-ordinated network of Sutton Coldfield Community Centres. Identify existing SCCT assets that may be suitable for repurposing with the right opportunity.		See Section 2 (grants categories), plus identification of suitable SCCT assets to repurpose if appropriate.
Equality, diversity and inclusion	Continue to explore ways to connect with more diverse groups. Consider accessibility to existing and future SCCT property/land.	
Exploring eco-options	Consider the environmental impact of any programme SCCT may be involved in and proactive options that may be suitable.	
What is required to commence the project		
Retain connections with local agencies, such as Chambers of Commerce, local Town Council, Integrated Care Partnership, and other community organisations.		
<b>Finance, feasibility &amp; risk appraisal</b> of projects & plans requiring significant change.		

## Aim 4: Being well run, efficient, accessible and inclusive

---

### **Do what we do better for more people and with best use of resources**

Trustees and staff continue to build upon where SCCT is today ([pages 11-13](#)) whilst adapting to the changing needs of the future. Timeframes below are indicative only.

### **Valuing people: An exceptional team and a great place to work: Year 1 - 5**

The quality of the work of SCCT is entirely dependent upon the calibre of its people.

The capacity of the small and highly dedicated team ([see figure 2, page 11](#)) must be considered alongside the range of initiatives in the five year plan and anticipated expansion over the years ahead.

Many office staff work a 3 day week. SCCT offices are formally accessible by phone and in person during those 3 days. However, as the organisation expands, it will be necessary to review the staffing structure and opening times to meet the business and operational demands of a growing charity.

Recruitment, reward, retention and talent policies must also enable staff to feel valued, rewarded and motivated in their commitment to SCCT. Such a framework must also support staff and Trustees in meeting the changing requirements of the charity.

### **Financial position and planning: Total return approach: Year 1**

The value of SCCT assets will grow over time, notably with reinvestment of land sales proceeds back into the endowment. If the investment principles are delivered ([see Investment principles, page 14](#)), this will lead to 1/3 of those receipts being reinvested into income generating assets (potentially financial investments), resulting in modest income growth to support provision of grants.

Over 2023, Trustees will consider use of the Total Return approach which, if approved, will allow some of the increased endowment value to be used for grants.

Before finalising and proceeding with any project we will remodel the rolling financial plan, in line with feasibility assessments, risk reviews and resulting implementation plans.,

### **Technology: Going digital - grants and property management: year 1-3**

Following the IT review, initiated in 2022, a more secure and user-friendly board reporting system has been introduced. Ongoing cyber security enhancements are now an operational norm with formal training in process.

In addition, plans will be developed to streamline management processes for grants, commercial property, and routine maintenance schedules.

### **Proactive charitable response: ([see Aim 2: Grants programme expansion, page 19](#))**

A greater demand for grants is likely due to the escalating cost of living. There is a high probability of unforeseen impact including extended pockets of poverty across all Sutton Coldfield wards. Therefore, SCCT will continue to review its grants strategy having already committed to researching into wider housing needs in Sutton Coldfield and improved impact reporting.

### **Reaching people: Marketing & communication: Year 1-5**

It will be important to widely communicate our five year plan and the projects that emerge. This will need to incorporate inclusive ways for SCCT to listen and learn from existing and potential beneficiaries and other stakeholders. We will improve reporting on the impact of our charitable activities through our website and other methods of communication.

**Social need:** included across all five aims

The potential ambitions set out in the Social Needs Review have been assessed by staff and Trustees; all that are within scope of the charity's scheme are included in the five year plan. All the potential ambitions, whether within or outside the remit of SCCT have been shared with key stakeholders in other agencies.

### **Equality, diversity and inclusion: Ongoing learning and actions: Years 1-5**

In order to embed EDI throughout the SCCT culture and all activities, ongoing learning and actions will continue, including decisions on introducing qualitative and quantitative methods that demonstrate progress, impact and improvement.

### **Exploring eco-options: Gaining knowledge and expertise: Years 1-5**

In order to explore and make informed decisions about making a positive environmental impact, new sources of knowledge and expertise will be required in relation to specific projects and schemes. Connecting with local initiatives and groups will support learning as well as understanding the progression of town, city and region ecological and decarbonisation plans.

#### 4: BEING WELL RUN, EFFICIENT, ACCESSIBLE AND INCLUSIVE

##### Work programmes from 2023-2028

##### Actions – Year 1

##### **Total return approach**

Financial modelling worked through. Proposals presented to the Board of Trustees.

##### Intended outcomes

Increased funding available for provision of grants.

##### Actions – Years 1-3

##### **Going digital – grants and property management**

To implement a solution to streamline and systemise grants and property processes and improve data.

More efficient management and monitoring. Improved data to inform planning.

##### Actions – Years 1-5

##### **Valuing people:**

##### **An exceptional team and great place to work**

Routine progress and review to ensure structure, capacity, resource, & policies support people at work.

Staff are well supported, valued, resourced and able to deliver business & charitable objectives. SCCT retains and attracts the best people.

##### **Reaching people: marketing & communications**

To support the five year plan with marketing & communications that include impact reporting.

Improved stakeholder engagement and awareness of SCCT plans and impact.

##### **Equality, diversity & inclusion**

Continued programme of learning and action plans. Identification of methods that evaluate impact.

EDI permeates the culture and all activities of SCCT

##### **Exploring eco-options**

Sourcing knowledge and expertise to gain an informed understanding of environmental factors relating to SCCT services, property and land and how to respond.

Able to demonstrate positive actions in place towards making a positive environmental impact.

Equality, diversity and inclusion

As above

Exploring eco-options

As above

##### What is required to commence the project

Sourcing of expertise related to each of the above programmes.

Financial modelling of projects and business plans to facilitate decisions.

**Finance, feasibility & risk appraisal** of projects & plans requiring significant change.



## Aim 5: Good management of assets and their use

### Manage our assets well and consider their community and ecological impact

Trustees are committed to good management of SCCT assets and, in doing so, consider their potential ecological and community benefits. This includes replacing the acreage of land sold for Langley SUE, implementing proactive woodland management of all SCCT woodland, and considering more effective use of existing land and property.

### A note about woodland management

SCCT relies upon specialist expertise for its woodland management. During 2021-2022, the Corsican pine in Manorial Wood was harvested to create the beginnings of a deciduous woodland. The learning from Manorial Wood has given a more comprehensive overview of the planning required to create and manage a bio-diverse woodland environment.

### Assets used for charitable purposes and community projects

Aims 1-4 demonstrate commitment to:

- the agreed principle to reinvest 1/3 of land sale receipts into assets that may be used by the community.
- the repurposing of SCCT existing assets (property or land).

Consideration will be given to assessing the social as well as financial value of assets.

### Land for energy and other purposes

SCCT seeks to explore how fallow land may be deployed for other purposes including making a positive environmental impact. This may involve using the land for generating renewable energy, whether solar, wind-generated, or ground sourced.

5: GOOD MANAGEMENT OF ASSETS AND THEIR USE	
2023-2028	
Actions – Years 1 - 5	Intended outcomes
Proactive management of all SCCT woodland.	Improved bio-diversity in the woodland. Reduced need for reactive action.
Replace the acreage of land sold for Langley SUE.	Land replaced.
Consider alternative sustainable purposes for SCCT land and property (see aims 1 & 4).	Greater ecological and community impact.
Equality, diversity and inclusion	Consider accessibility improvements to specific property and land assets.
Exploring eco-options	Explore where land may be repurposed for purposes that contribute to environmental sustainability.
What is required to commence the project	
Ongoing searches and guidance from property advisors.	
<b>Finance, feasibility &amp; risk appraisal</b> of projects and plans of significant change.	

## Estimated timeline summary

Key: Five Aims – Actions EDI priorities & Eco-options

	2023	2024	2025	2026	2027	2028
<b>1. Almshouses research &amp; assessment of future need</b>						
Research phase						
Design phase						
Plan ready for build						
<i>Are there any overlooked groups (research phase)?</i>	EDI					
<i>What eco-options may be suitably implemented?</i>	Eco					
<b>2. Grants programme expansion</b>						
Review grant assessment & monitoring processes						Ongoing review
Support access to sport						“
Support access to employment						“
Support improved welfare and financial guidance						“
Support organisations addressing homelessness <sup>5</sup>						“
Gain knowledge relating to domestic abuse support						
Consider a jointly run community conference						
Support addressing mental health and loneliness						
<i>Ensure whole-town approach re poverty/exclusion</i>	EDI					
<i>Require grant applications to demonstrate inclusion</i>	EDI					
<i>Continue advancement of environmental protection</i>	Eco					
<b>3. Supporting heritage, green spaces and community</b>						
Heritage centre: liaison with Town Council						
Sutton Park: maintain view of governance						
Community centres: potential grant option						
Community centres: potential repurpose of assets						
<i>Explore connections with more diverse groups</i>	EDI					
<i>Consider accessibility to SCCT property &amp; land</i>	EDI					
<i>Consider environmental impact of any programmes</i>	Eco					
<b>4. Being well run, efficient, accessible &amp; inclusive</b>						
Assessment of the Total Return approach						implement if agreed
Going digital – grants and property management						
Valuing people: review of staff structure & policies						
Reaching people: marketing & communication plan						
<i>Ongoing EDI learning, actions and evaluation</i>	EDI					
<i>Sourcing eco knowledge and expertise</i>	Eco					
<b>5. Good management of assets and their use</b>						
Proactive management of SCCT woodland						
Replacement of acreage sold for Langley SUE						
Consider alternative sustainable purpose for assets						
<i>Consider improving accessibility to specific assets</i>	EDI					
<i>Explore repurposing land for environmental benefit</i>	Eco					

**An appraisal of finance, feasibility and risk will be conducted**  
for projects and plans requiring significant change

<sup>5</sup> Ensure this does not overstep statutory responsibility

## Contact us

---

The Chief Executive  
Sutton Coldfield Charitable Trust  
Lingard House  
Fox Hollies Road  
Sutton Coldfield  
B76 2RJ

Email: [info@suttoncharitabletrust.org](mailto:info@suttoncharitabletrust.org)

Tel: 0121 794 0970

You will also find further information on our website: [www.suttoncoldfieldcharitabletrust.com](http://www.suttoncoldfieldcharitabletrust.com)