

Local Trust strategy

April 2014 – March 2017



Contents

Local Trust strategy	1
1 Introduction.....	3
2 Local Trust.....	3
3 Our values	4
4 Our approach	4
5 Our strategy.....	6
6 Rewarded risks.....	7
7 Resources required	8
8 Our action plan	9
9 Research, monitoring, evaluation and story-telling.....	11
10 Conclusion	11
About us	12
11 Local Trust	12
12 Big Local Trust.....	12
13 Big Local	12
14 Local Trust SWOT analysis.....	13
15 Local Trust PEST analysis	14



1 Introduction

This document outlines the strategy for Local Trust for the next three years. It builds on what we have already done, shares our aspirations for the future and highlights how we will achieve them. We are excited about the future, keen to spread our approach and motivated to achieve the best we can for all those we support.



2 Local Trust

Local Trust is a unique organisation supporting **resident and community led solutions to create lasting change** throughout England. We use a community development approach to resident and community led regeneration of areas. We believe that those who make up the community know best what's needed and are the most likely to come up with the solutions to make a lasting positive difference to the places where they live, work and socialise. We also believe that we can help them to make that happen.

Our **vision** of the future is that each community we work with is resilient and confident and their area is a good place to live.

Our **mission** is to enable residents to make their communities and their areas even better places in which to live.

We take a **collaborative approach** to all that we do; building alliances and relationships to the benefit of each community we support because we know that this makes the best use of the skills of others, growing and building the capacity of all those we work with whilst also achieving our vision and mission. In communities we support organisations that are trusted locally and selected by the community. We are flexible and do our best to be responsive, humble and friendly in all that we do.

We are keen to **share our experiences and influence others** to use a resident and community led approach to creating lasting change and to that end we place importance on learning and influencing others to make use of what we are learning to enhance their support to communities they support.

We think that we could, over time, develop this approach for communities of interest, but, for the time being, we are focused on a place based approach.

3 Our values

At Local Trust we:

- encourage residents to have greater control over the things that matter most to them; supported by those they trust
- work with others to make a positive, lasting difference
- are open, honest, friendly and supportive
- do our best to keep things simple and clear
- value equality and diversity
- continually seek and learn from experience to develop better ways in which people locally can improve the quality of their lives.

4 Our approach

Our **resident and community led approach** is both a philosophy and a methodology and informed by our learning from past community based programmes (Big Local: What's new and different, Institute for Voluntary Action Research, July 2013) which indicate that the things that matter most are:

- pace of development
- starting with assets not deficits
- willingness to take risks
- light touch support
- peer support and opportunities for reflection.



We believe that a community and resident led approach to creating lasting change:

- develops the skills and confidence of the people involved and enables them to work with others to the benefit of their community
- builds on the opportunities and assets available in each community
- creates lasting, long term solutions.

Underlying our approach is a belief that residents have a capacity and desire to drive change, and can achieve lasting and positive results when supported by those they trust and respect thereby building skills, confidence, networks, relationships and expertise in each community.

We realise this approach won't suit everyone or every situation but we are passionate about it because we believe it provides more embedded and lasting change. We have a dynamic and evolving approach based on what we and others are learning and we are not afraid to take risks, experiment or fail as we learn from our own experiences and those of the people we are supporting. We were established in 2011 by a consortium of partner organisations to manage the Big Local Trust and since then we have developed nurtured and refined our unique style and approach.

Our **unique selling points** are that we at Local Trust:



● **champion a resident and community led approach** and encourage others to give greater control, skills and confidence to residents



● **retain a small central staff team who work collaboratively with others** experienced and trusted in their specialist field who share our values to offer the very best support for community led activity – nationally and locally



● **spot, support and publicise individuals and groups** that make good things happen in their community to inspire and encourage further activity



● **use common sense, imagination and creativity to find more effective ways of doing things;** and encourage communities to do the same



● **aim to spend time and money on ‘proving it’** alongside our delivery so that we know what works and what doesn’t within a culture of sharing and learning.

5 Our strategy

Our long term strategy is to:

- give residents greater control, skills and confidence to make a difference to the things that matter most to them in their communities
- use rigorous research, evaluation and story-telling to learn and develop our approach to achieve greater impact; make resources go further and enable joined up solutions to complex issues
- position Local Trust and those we support to influence the approach of others working in communities including: funders, government, charities and businesses with Local Trust seen as a leading innovator in transforming communities
- create widespread change so that residents and those supporting them in communities have greater involvement and control over the things that matter most to them.



Our key objectives for the next three years are to:

1. deliver our work really well in a clear, collaborative way to establish our community led, positive approach so residents gain greater control, skills and confidence to make a difference to the things that matter most to them in their communities
2. use rigorous research, evaluation and story-telling to learn and develop our approach to achieve greater impact; lever in resources; enable joined up solutions to complex issues; and enable people to make their communities and areas even better places in which to live
3. start to realise our long term goal to position Local Trust as a leading innovator in transforming communities; and for us and those we support to influence others working in communities to follow our approach
4. ensure Local Trust runs effectively, efficiently and adopts good practice.

In addition, recognising that we need to influence others we will proactively look for new opportunities (funding, partnerships, activities, sponsors) to:

- provide more / additional resources into current programmes
- use our approach in other places and with other programmes
- be enterprising and transformational whilst learning from our experience and staying true to our approach.

To achieve this we will work with corporate sponsors, funders, sector partners, local and national government and others interested in our approach.

6 Rewarded risks

We do, of course, manage risks efficiently and we recognise the importance of spending time and energy on rewarded risks i.e. those that can give positive returns and benefits.

Some risks are all downside and no upside. For example, if we fail to comply with the law there are significant consequences, but there is no extra credit for being even more compliant. Similarly, it is important to avoid disruptions to say, our finance system, but doing that simply meets the expectations of those we fund; it doesn't bring us greater reward.

Other risks are all about upside, for example, developing a resident led approach to supporting communities; having an investment strategy and funding model based on community need. The primary reason for taking these rewarded risks is to add value to what we are doing and what we want to achieve. Although taking these risks might have a downside, the potential upside is greater.

We have identified that rewarded risks include:

- residents becoming more confident and increasing their influence; having networks and skills to do things themselves, becoming mobilised to create lasting resident led solutions
- creating effective relationships and collaborative approaches; working with others via a small staff team to provide the best support to the communities we support
- doing innovative things and being noticed (e.g. investing funds centrally to give a return over the longer term and providing loans to local community enterprises) to build the sustainability of activities in the communities we support
- using common sense, imagination and creativity to find ways of enabling residents and those who support them, to make their areas even better places in which to live.

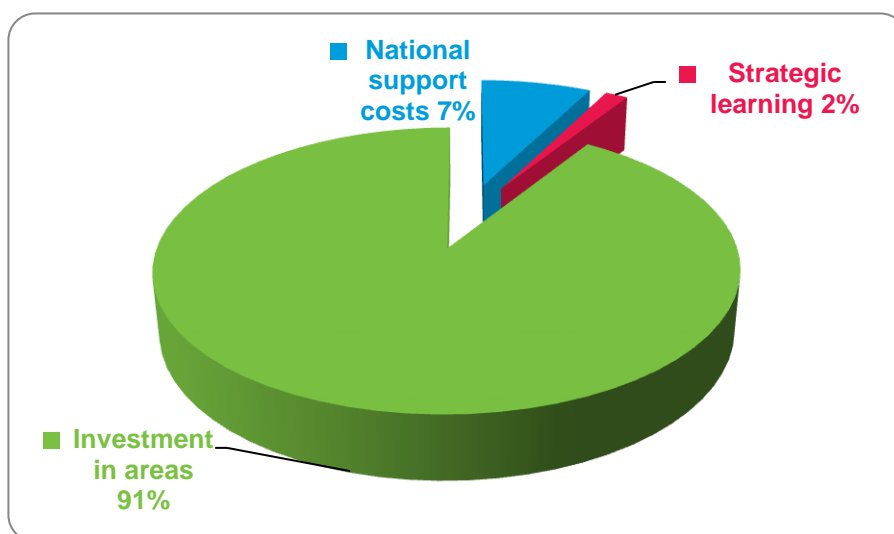


7 Resources required

In order to achieve our strategy we need resources both human and financial. We have a competent and enthusiastic staff and trustee team and we work with a range of experienced and trusted partner organisations nationally and locally.

As a new organisation we have no unrestricted funds or reserves; but we are in the fortunate position of being the corporate trustee of Big Local Trust, managing the expendable endowment and the Big Local programme. Big Local is an exciting opportunity for residents in 150 areas around England to receive funding and support over 15 years to make a massive and lasting positive difference to their communities. The trust deed that governs Big Local Trust requires spend of £220m by 13 February 2027.

There is a 15-year indicative budget split between national support costs, strategic learning and investment in areas. These headings capture our costs as the corporate trustee managing Big Local, those of our national partners and Big Local reps as well as Big Local funded activities in 150 areas until 2027.



During the next three years the national support costs (including Local Trust costs) are:

2014/15	£1.1m (total Big Local spend is anticipated to be £11.6m)
2015/16	£1.1m (total Big Local spend is anticipated to be £19.1m)
2016/17	£1.2m (total Big Local spend is anticipated to be £22m)

Because of our ambition we will proactively look for new resource opportunities over the next three years, and will take opportunities that arise (funding, partnerships, activities, sponsors) for existing areas we support and to extend our approach to other places and with other programmes. We realise we need to 'grow the Local Trust CV' and to that end we currently have two small pieces of work in addition to Big Local:

- a restricted grant of up to £17,000 to spend over the next two years from the Community Development Foundation to support our involvement with the Community Investment Coalition, enabling us to provide examples where affordable finance is an issue and potential solutions for the provision of affordable finance
- agreement to provide initial support to the new directors of the Building Communities Trust in Wales (funded by the Big Lottery Fund) so they can benefit from our experience.

8 Our action plan

Below is our indicative three year plan to help us enable residents (and those who support them) make their communities and their areas even better places in which to live. This informs our annual organisation work plan and our individual staff work plans. It is reviewed and refreshed annually.

We will:	Key actions:	Key milestones:
<p>1 Deliver our work really well in a clear, collaborative way to establish our community led, positive approach so residents gain greater control, skills and confidence to make a difference to the things that matter most to them in their communities.</p>	<ul style="list-style-type: none"> ● retain the mix of grants, social investment and commissioning ● review and endorse proposals, partnerships and plans annually ● network and learn with areas to engage and inspire ● train, up-skill and encourage people's confidence 	<ul style="list-style-type: none"> ● all areas we support have access to grants, social investment and commissioning: say 20% using all three ● all endorsed proposals, plans and partnerships reviewed and updated annually by the community – with a focus on sustainability ● annual programme of 20 plus events to encourage peer learning and sharing ● annual needs based training programme of 20 plus sessions offered to people in communities
<p>2 Use rigorous research, evaluation and story-telling to identify if our approach starts to have impact; levers in resources; enables joined up solutions to complex issues; and enables people to make their areas and communities even better places to live.</p>	<ul style="list-style-type: none"> ● adjust delivery based on our learning from research, evaluation and story-telling ● manage external contracts to evaluate our approach ● use case studies and story-telling to demonstrate, inspire and share progress ● publish research and evaluation reports including impact measures ● support areas to 'prove it' 	<ul style="list-style-type: none"> ● learning from research, evaluation and story-telling informs our strategy and delivery – we publish clear evidence of changes made nationally and locally ● research, evaluation and story-telling illustrates the impact of our approach and leveraging in of resources at a community level ● publish at least 20 case studies (stories) a year to share our approach and its impact ● publish research and evaluation reports – at least four per year ● all communities we support are involved in self-evaluation – proving it; and demonstrating their achievements and impact

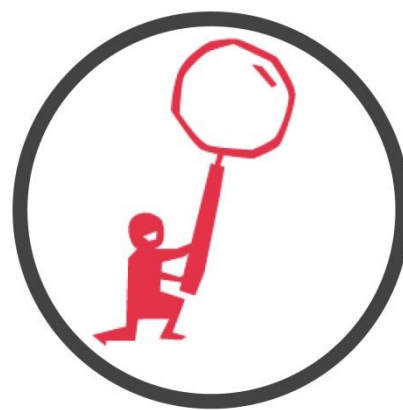
We will:	Key actions:	Key milestones:
<p>3 Position Local Trust and those we support to influence the approach of others working in communities including: funders, government, charities and businesses – with Local Trust seen as a leading innovator in transforming communities.</p>	<ul style="list-style-type: none"> ● act as a voice with areas on issues that matter most to residents ● develop appropriate relationships with national media ● support the Community Investment Coalition ● ensure all behaviour and communication (on paper, in person, web, twitter etc.) helps us influence others ● look for new opportunities (funding, partnerships, activities, sponsors) to provide more / additional resources into areas we support and / or to use our approach in other places and with other programmes 	<ul style="list-style-type: none"> ● at least 30 communities we support share their views nationally and locally with our help ● new website created and kept fresh, sharing stories, influencing others ● member of the Community Investment Coalition providing a route into communities on fair finance issues ● six new opportunities developed to the benefit of the communities we support and / or to take our approach to other communities
<p>4 Ensure Local Trust runs effectively and follows good practice.</p>	<ul style="list-style-type: none"> ● ensure our systems and procedures enable us to achieve our mission and adjust these in light of feedback from those we support; from research, evaluation and story-telling; from other stakeholders ● maintain an effective board of trustees to govern Local Trust ● be a good employer for staff ● work in partnership and collaboration with other organisations ● effectively manage the Big Local Trust 	<ul style="list-style-type: none"> ● annual audit finds Local Trust is appropriately governed and managed ● systems and procedures are reviewed and developed annually to meet requirements ● trustees have skills and expertise for the role ● staff feedback shows Local Trust is a good employer ● majority of activities nationally and locally delivered through suitably experienced organisations, working collaboratively ● Big Local Trust endowment managed in line with trust deed

9 Research, monitoring, evaluation and story-telling

We use research, monitoring, evaluation and story-telling to learn and develop our approach to achieve greater impact; make resources go further and enable joined up solutions to complex issues. Sometimes we call this strategic learning because we use knowledge and information from a range of sources to learn and then inform our strategy and approach; both locally and nationally. We encourage the communities we support to share their experiences so others can learn from what they have done and we commission research and evaluation to help us demonstrate impact and understand what is happening, and why. We embrace this approach and recognise the importance of short and long term research, monitoring, evaluation and story-telling so that we can find out what works as well as what doesn't so we can learn, adapt or change.

We use a range of methods to capture this including:

- external evaluation
- longitudinal multi media research project
- academic research on community control
- self-evaluation support to the communities we support
- case studies and story-telling to share progress
- monitoring data provided by the organisations we fund
- primary research in the communities we support
- analysis of our approach related to other funders.



10 Conclusion

It's an exciting time to be at Local Trust. We are a young organisation with an ambitious strategy. We are passionate about what we do and are keen to achieve the best we can for all those we support. If you want to give us feedback, ideas or just get in touch please do. We'd love to hear from you as we develop our approach to enable residents and those who support them, make their communities and their areas even better places in which to live.

Local Trust company no. 7833396, charity no. 1147511

Big Local Trust charity no. 1145916

Big Local Trust was established by the Big Lottery Fund with a National Lottery grant of £196,873,499

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About us

11 Local Trust

Local Trust is a national charitable company limited by guarantee. We were established in 2011 by a consortium of partner organisations led by the Community Development Foundation. The consortium also included Living Space Project (formally Capacity Global), CCLA, the Institute for Voluntary Action Research, the National Association of Neighbourhood Management, Renaisi and UnLtd.

Local Trust is operated under the rules of its memorandum and articles of association dated 3 November 2011 and amended by written resolution dated 27 March 2012. We have no share capital and the liability of each member in the event of winding-up is limited to £1. Local Trust was registered with the Charity Commission in England and Wales on 30 May 2012.

Local Trust is governed by a board of up to 12 trustees who delegate the day-to-day running of Local Trust to the chief executive in line with the relevant policies and procedures developed and agreed by the board. We currently have nine trustees and there is a small staff team of 11 who work with partners to achieve our strategy. The office is based at the Angel, Islington in London.

12 Big Local Trust

Big Local Trust is an unincorporated charity governed by a trust deed dated 13 February 2012 and the deed of amendment dated 5 June 2013. Big Local Trust was registered with the Charity Commission on 15 February 2012. Local Trust is the corporate trustee of the Big Local Trust and established Big Local Trust with the Big Lottery Fund. The Big Lottery Fund provided a National Lottery grant of £196,873,499. Big Local Trust funds Big Local which is Local Trust's first and major initiative.

A protector is appointed by the Big Lottery Fund to provide stewardship to the Big Local Trust. The protector has a fiduciary duty to ensure the integrity of the administration of the Big Local Trust and the propriety of its procedures, and if necessary report matters of serious concern to the Big Lottery Fund or the Charity Commission. Each year the protector prepares a statement for publication in the annual report consisting of an explanation of the function of the protector and how the function has been carried out. The Big Local Trust protector can be contacted via Local Trust or the Big Lottery Fund.

13 Big Local

Big Local is an exciting opportunity for residents in 150 areas around England to use at least £1m each to make a massive and lasting positive difference to their communities. Big Local brings together all the local talent, ambitions, skills and energy from individuals, groups and organisations who want to make their area an even better place to live.

The **aim** of Big Local is to ensure that people are connected, people have choice, and people are supported to achieve lasting change in the place where they live. Underpinning this is our commitment to support residents over the long term to learn skills and gain the confidence to make decisions in their communities to bring about transformational change. We believe that change should be resident and community led so enabling change through ownership.

The outcomes for Big Local are:

1. Communities will be better able to identify local needs and take action in response to them.
2. People will have increased skills and confidence, so that they continue to identify and respond to needs in the future.
3. The community will make a difference to the needs it prioritises.
4. People will feel that their area is an even better place to live.

14 Local Trust SWOT analysis

Red: rewarded risk

<p>Strengths of Local Trust</p> <ul style="list-style-type: none"> ● resident led approach makes changes and activities more sustainable in the communities we support ● Big Local Trust endowment is for 15 years / have time ● capable trustee and staff team ● positive relationship with Big Lottery Fund ● small staff team working with and through other organisations 	<p>Opportunities for Local Trust</p> <ul style="list-style-type: none"> ● bid for new work (related to our approach) ● evidence to influence ● lever in more resources ● doing innovative things and being noticed (e.g. social investment, investment strategy) ● work with other trusts / government ● take model abroad ● use common sense, imagination and creativity
<p>Weaknesses of Local Trust</p> <ul style="list-style-type: none"> ● 'all eggs in one basket' / limited capacity to develop new work / limited track record ● delivery via others is harder to control ● seen to have money that others want ● small staff team so vulnerable when key staff leave 	<p>Threats to Local Trust</p> <ul style="list-style-type: none"> ● lose Big Local Trust ● collaboration means our approach is not seen as 'ours' ● new trusts become competitors ● 'one trick pony' i.e. only do Big Local (albeit maybe with more areas) ● plus there will be threats that we can't know yet

15 Local Trust PEST analysis

Political <ul style="list-style-type: none">● reduction in public expenditure leads to increased pressure on services● changes to demographics and household-types due to policy initiatives e.g. immigration, welfare reform● decision-making becomes harder as more competition for scarce resources	Social <ul style="list-style-type: none">● growing inequalities amongst communities, bigger divides and polarities emerge● population ages● unemployment / youth unemployment increases
Economic <ul style="list-style-type: none">● a depressed economy sustains low wages● more SMEs, local businesses and self-employed people● transport and fuel costs increase, leading to increased fuel-poverty● interest rates stay low and banking industry stays volatile	Technological <ul style="list-style-type: none">● broadband coverage complete● increase use of tablets and mobile phones● increased home working due to technological advances

Our analysis of the PEST is that the outcomes we seek within this environment are that the communities we support:

- have more connections and increased cohesion
- become more confident in their own voice and increase their influence
- have networks and skills to do things themselves, become mobilised to initiate and respond
- create resident led solutions.