

## Local Trust – Strategic Plan 2018-21

### SUMMARY

Over the period of the Strategic Plan Local Trust will focus on the following overarching objectives:

*Supporting Big Local partnerships to achieve brilliant things in their areas*

*Influencing and informing policy and practice on the future of local communities*

To support these objectives, over the next three years Local Trust will be:

- *Responsive and engaged* – constantly working to improve the way we work to ensure we are providing Big Local partnerships with the access to the support and assistance they need to achieve their ambitions
- *Outward looking and partnership focused*, prioritising building new collaborations and partnerships – both nationally and locally
- *Focused on the future* – putting Big Local in context, and ensuring there is a Big Local legacy, both for areas and for the programme as a whole.
- *Proactive, questioning and challenging* – of both ourselves and Big Local areas
- *Influential, connected and informed* - contributing to, influencing and informing wider debates on the future of communities drawing on our learning from Big Local (subject to the final resolution of technical issues relating to the Deed, with support from the Charity Commission)

#### **Priority 1: Responsive and engaged**

Big Local areas all have plans in place, and most are moving successfully from set-up towards the main delivery phase of their work. As they develop and mature, Big Local areas are diversifying – we are seeing different structures emerging and different approaches to delivery being taken. We need to ensure that, over the period of this plan, Local Trust continues to focus relentlessly on providing Big Local areas with the best possible support, and that this support reflects and is informed by their changing opportunities and needs.

#### **Priority 2: Outward looking and partnership focused**

During the Big Local set-up phase, Local Trust focused on supporting Big Local areas through a small number of national partners. With the programme maturing, Local Trust has begun to expand the range of partners it works with. Over the period of this plan we will continue to increase the range of strong, value-based relationships we have invested in and the range of skills and expertise we – and local areas – can draw upon to support the delivery of Big Local.

#### **Priority 3: Focused on the future**

In three years' time, we will pass through the mid-point of the programme. Legacy, both for Big Local areas and for the programme as a whole, is already becoming an important issue. Local Trust has already asked Big Local areas to consider legacy issues in their next plans. As they do so, areas will need to take account the likelihood of continuing change in external operating conditions, including wider economic and social pressures.

**Priority 4: Proactive, questioning and challenging**

We seek to constantly challenge our own assumptions, practices and performance, reviewing, researching and evaluating all that we do to ensure we are achieving the most impact we can. As they increase their activity and impact we will encourage and support Big Local areas to do the same.

**Priority 5: Influential, connected and informed**

Over the period of this plan we will significantly increase our investment in research and communications aimed at sharing learning and experience from Big Local to influence and inform a much wider interested audience, including grant funders, policy makers and delivery agencies.

# Local Trust – Strategic Plan 2018-21

## 1. Introduction

1.1 This document updates and extends the Strategic Plan 2017-20 approved by the Local Trust Board in November 2017, setting out Local Trust's overall strategic intentions for the next three years. Together with the most recent Business Plan and Budget approved by the trustees, it makes up the *Big Local Business Plan*, replacing and superseding the document referred to in Background C of the Big Local Trust Deed and any subsequent business planning documents prepared for Big Local Trust and Local Trust.

## 2. Background

2.1 Local Trust was established in 2012 to deliver Big Local, a Big Lottery-funded programme which committed £1m each to 150 neighbourhoods across England. The £217m originally provided by the Big Lottery Fund to support this programme is the largest single-purpose Lottery-funded endowment ever made, and the biggest ever investment by a non-state funder in place-based, resident-led change.

2.2 In terms of scale, time horizon and ethos, nothing like Big Local has ever existed. Designed from the outset to be radically different from other funding programmes, at the heart of Big Local is a vision of empowered, resilient, dynamic, asset-rich communities making their own decisions on what is best for their area. In contrast to conventional top down, time-limited, project-led funding, the funding awarded to each Big Local area is provided on the basis that it can be spent over 10-15 years at communities' own chosen pace, and on their own plans and priorities. The programme concludes in March 2027, although most funds are expected to have been spent by local areas by March 2026 at the latest.

2.3 To draw down the funding, resident-led partnerships of local volunteers are expected to work together to form a common vision for their area and agree priorities to make a difference to the things that matter most to them in their community. All of this is captured in a shared Big Local Plan for each area that is consulted on widely before it is approved. The local volunteers that make up each Big Local partnership are supported in developing and delivering their plan by an extensive programme of training, networking and light-touch on the ground support, provided by Local Trust and its partners.

2.4 Big Local's ambition extends well beyond simply providing grant money; it also aims to leave a wider legacy:

- networks of resilient and confident local people capable of leading change in their communities
- an active public debate on communities and place – both nationally and locally - informed by the incredible learning and inspiration generated by Big Local
- great partnerships, connections and collaboration, both nationally and locally, helping the programme achieve influence and impact well beyond the money committed.

2.5 The last six years have seen the successful launch of an innovative and unique programme; the emergence of new community leaders and volunteers; and amazing things happen in communities up and down the country. We have also learnt a lot about the potential, limits and challenges associated with delivering a radically new approach to funding communities.

- 2.6 The Big Local programme continues to grow and develop. As a result of careful management of the Big Local Trust endowment, in September 2017 Local Trust announced an increase of £105k in its commitment to each Big Local area, bringing the total allocation to each area to £1.105m, alongside an enhanced and expanded support offer.
- 2.7 Most importantly, Big Local has provided compelling evidence of what can happen when you release the energy and initiative of residents to transform the communities they live in. With Big Local due to run until 2027, we can look forward to almost a decade more of inspiring local initiative, great projects and huge amounts of learning about the delivery of resident-led change.

### **3. What is Local Trust?**

- 3.1 Local Trust is a charitable company limited by guarantee, operating across England. It was established in 2012 for the sole purpose of delivering Big Local, following a competitive tender exercise run by the Big Lottery Fund. Local Trust is the sole corporate trustee of the Big Local Trust, the charity which holds the Big Local endowment. Local Trust manages the Big Local programme on behalf of the Big Local Trust.
- 3.2 The overwhelming balance of Local Trust's work relates to the delivery of Big Local – all but £500k of its £185m assets (as at 2017-18) relate to the delivery of the Big Local programme. Whilst we have the ability as an organisation to take on other work, including new grant funding programmes, expenditure on activities other than Big Local amounted to less than 0.14% of total activity by turnover during 2017-18. A short note on this other activity is included at the end of this strategy. If we take forward additional work, including new funding programmes, during the period of this strategy we will only do so where it is clear that this will not impact on our ability to deliver Big Local nationally and locally.
- 3.3 Initially, much of Local Trust's activities were delivered by a network of outsourced contractors and partners, with a small central administrative team. While Local Trust continues to outsource some aspects of its work, over the last year Local Trust has grown its central team and reduced its reliance on external contractors. This has enabled Local Trust to commit more resources in ensuring that programme and financial management processes are robust and effective; invest more time in engaging directly with Big Local areas to understand and respond to their needs; and ensure that the learning from Big Local is effectively gathered within the organisation and shared with others. We would expect over the period of this strategy that we will further consolidate delivery in-house where that will improve our ability to effectively deliver the programme and/or offer better value for money than current arrangements.
- 3.4 More generally, over the period of this strategy, Local Trust will continue to review its business model and approach to ensure that it is delivering value for money, and providing effective support to Big Local areas as they enter the delivery phase of the Big Local programme.

### **4. Setting up Big Local: 2012-16**

- 4.1 Following its establishment in 2012, Local Trust's main focus was on successfully setting up Big Local partnerships in all 150 areas identified by the Big Lottery Fund, and putting in place the people and systems needed to support delivery of the programme nationally and locally. In its last Strategic Plan, which ran from 2014-17, Local Trust set itself five main ambitions:
- to deliver Big Local really well in a clear, collaborative way [and] to establish our resident and community led, positive approach in all Big Local areas
  - use rigorous research, evaluation and story-telling to learn and develop Big Local to help Big Local areas achieve impact and enable people to make their areas even better places

in which to live

- position Big Local as an innovative way to transform communities, and influence others working in communities to follow the Big Local approach
- ensure Local Trust runs effectively, efficiently and adopts good practice in the management of Big Local
- work with Big Local areas and partners to look for new opportunities: funding, partnerships, activities, sponsors, to provide additional resources into Big Local.

4.2 By the start of final year of that strategy, good progress had been made towards delivering on all of these priorities:

- Resident-led partnerships had been set up in all 150 Big Local areas; all areas had a plan in place, which had been consulted on with their local communities, setting out shared objectives and ambitions; and areas were starting to gain confidence as they committed funds locally to deliver those plans.
- Local Trust had effectively established core financial and programme management systems for Big Local; effective support arrangements were in place for Big Local areas; and an appropriately skilled and resourced central team was in place.
- Local Trust's research and evaluation programme had been established. Two major longitudinal evaluations had been launched, one of them led by the Third Sector Research Centre, the other an independently funded evaluation taken forward in partnership with the School for Public Health Research. A range of thematic research, aimed at sharing learning between Big Local areas, had been published. A growing bank of practical and inspirational case studies had been assembled for Big Local areas to draw upon as they develop and take forward their plans.
- With all areas now moved from planning and partnership building to delivery, an ambitious programme was in development, aimed at sharing the learning from Big Local more widely. Growing interest in place-based funding; devolution of power; and resident-led, collaborative approaches to service provision meant that this was an important time for Local Trust to start to influence and inform public debates about the future of communities.

## **5. Moving into delivery phase: 2016-21**

5.1 As it enters 2018-19, Local Trust is at the mid-point of the main delivery phase of its work – supporting the increasing delivery focus of the Big Local programme, as Big Local areas start to spend more money and take on more ambitious projects. In the first five years from the start of the programme to March 2016, around £56m was committed to setting up Big Local partnerships across the country, helping them to grow and funding initial projects on the ground. Over the current five-year period that started in April 2016 and runs to March 2021, it is expected that over £135m will be committed as local areas accelerate their delivery ambitions.

5.2 In November 2017, Local Trust approved an interim strategic plan for this new phase of work. The intention was not to make fundamental changes to the core elements of the Big Local programme:

- the funds pledged to each of our Big Local areas;

- the terms under which it has been awarded;
- the long-term nature of the funding;
- the absolute focus and commitment to supporting Big Local areas in achieving their ambitions; and
- the core vision of empowered, resilient, dynamic, asset-rich, resident-led communities.

5.3 However, the plan highlighted the need for Local Trust and Big Local to adapt and respond to the different demands of the delivery phase of the programme, and to review and refresh some aspects of the way it delivers the programme to ensure it is meeting the changing and developing needs of Big Local areas.

5.4 The 2017 interim Strategic Plan set the following five priorities for Local Trust and the Big Local programme:

- Ensure Local Trust is geared up to support Big Local areas as they move from start-up to delivery
- Respond to the diversifying interests and support needs of Big Local areas
- Increase collaboration and partnership – both nationally and locally – for the benefit of Big Local areas; working hard to generate greater awareness of Big Local; and helping our areas benefit from the engagement, interest and involvement of a much broader range of grant funders, policy makers and delivery agencies
- Become more proactive and challenging – encouraging innovation; accepting risk; challenging and questioning ourselves constantly; and effectively supporting all Big Local areas to achieve their full potential.
- Look to the future – starting to address legacy issues, both of our Big Local areas, and of the programme as a whole.

5.5 Whilst the plan was only approved in November 2017, prior drafts had been discussed with trustees over the course of the previous 12 months, and the content of the plan amounted to a pragmatic reflection of the organisation's shifting priorities from the start of 2017-18. During this period Local Trust had also sought to resolve a number of technical issues in the Big Local Trust Deed, to ensure that there were no barriers to effectively delivering Big Local going forward, in particular in relation to the sharing of learning from the Big Local programme – a key element of the Founders Wishes set out in Schedule 8 of the Deed. As noted elsewhere in this plan, these issues are likely to be fully resolved in the first part of 2018-19.

## **6. New Strategic Priorities 2018-21**

6.1 The key objectives for the 2018-21 Strategic Plan broadly reflect those of the interim Strategy approved in November 2017, updated to reflect (i) developing understanding of the needs of Big Local areas; and (ii) the resolution of technical issues relating to the Big Local Trust Deed.

6.2 Over the period of the Strategic Plan we will focus our efforts on:

*Supporting Big Local partnerships to achieve brilliant things in their areas*

## *Influencing and informing policy and practice on the future of local communities*

6.3 To support these ambitions, over the next three years we aim to be:

- *Responsive and engaged* – providing Big Local partnerships with the support and assistance they need to achieve their ambitions
- *Outward looking and partnership focused*, prioritising building new collaborations and partnerships – both nationally and locally
- *Focused on the future* – putting Big Local in context, and ensuring there is a Big Local legacy, both for areas and for the programme as a whole.
- *Proactive, questioning and challenging* – of both ourselves and Big Local areas
- *Influential, connected and informed* - contributing to, influencing and informing wider debates on the future of communities drawing on our learning from Big Local

### **Priority 1: Responsive and engaged**

6.3.1 Big Local areas all have plans in place, and most are moving successfully from set-up towards the main delivery phase of their work. As they develop and mature, Big Local areas are diversifying – we are seeing different structures emerging and different approaches to delivery being taken. We need to ensure that, over the period of this plan, Local Trust continues to focus relentlessly on providing Big Local areas with the best possible support, and that this support reflects and is informed by their changing opportunities and needs.

- We will continue to aim to deliver high quality, efficient, low bureaucracy, responsive programme management and grant funding to our areas.
- We recognise that the sort of programme we are delivering is resource intensive to support, and will keep our staffing structures, governance, policies, processes and business systems under review to ensure they are fit for purpose offer value for money.
- We will effectively manage our endowment to ensure we can meet our financial obligations to areas and - by 2020-21 - consider whether we are able to distribute additional funds to areas from any further returns on our investment.
- We will further increase our direct engagement with Big Local areas, alongside drawing on learning from our partners and our research activities, to ensure that our work is informed by a keen understanding of what is happening at a local level.
- With many local areas growing in confidence and maturity, we will seek to encourage and support those that want to take risks and explore innovative approaches to tackling deep-seated and tricky problems.

### **Priority 2: Outward looking and partnership focused**

6.3.2 During the Big Local set-up phase, Local Trust focused on supporting Big Local areas through a small number of national partners. With the programme maturing, Local Trust has begun to expand the range of partners it works with, increasing the range of strong, value-based relationships we have invested in and the range of skills and expertise we – and local areas – can draw upon. We will encourage local areas to do the same – reflecting our

understanding that for some areas, a key issue for them to address is one of connectivity and low historic levels of network/bridging capital – something they may be able to start to address through building new relationships and partnerships.

- Over the period of this plan, we will develop partnerships with other national funders with the aim of finding and developing areas for collaboration and partnership to provide Big Local areas with access to new opportunities, ideas and support.
- We will evaluate and learn from the new delivery partnerships established during 2017-18 to inform continued growth in partnership working over the period of this plan.
- We will support and encourage Big Local areas wanting to explore collaboration and new partnerships; including with other Big Local areas

### **Priority 3: Focused on the future**

6.3.3 In three years' time, we will pass through the mid-point of the programme. Legacy, both for Big Local areas and for the programme as a whole is already becoming an important issue to engage with. Local Trust has already asked all areas to consider legacy issues in their next plans. As they do so, areas will need to take account the likelihood of continuing change in external operating conditions for our areas, as Brexit progresses and national and local delivery environments reflect wider economic and social pressures.

- We will support our areas to look beyond immediate delivery horizons, place their work in a wider context and plan for emerging economic and social change.
- We will work with all areas to help them to develop their thinking around legacy, to ensure that Big Local continues to have an impact after they have spent all their resources.
- We will – by the end of the period of this plan – have started to develop a legacy strategy for Big Local as a whole, focusing on the long-term learning that can be gained from the delivery of what is a ground-breaking and innovative place-based funding programme.

### **Priority 4: Proactive, questioning and challenging**

6.3.4 We seek to constantly challenge our own assumptions, practices and performance, to ensure we are achieving the most impact from our work. Our hope is that Big Local areas can be encouraged and supported in doing the same. Whilst many areas have already achieved significant impact from their work, some areas have found it harder to make progress. A few areas have started well, but perhaps lost impetus or focus. Some have developed and are now capable of achieving far more than they might ever have conceived of at the start of their journey.

- We will continue to develop and refine our information systems, ensuring that we are able to spot issues and offer support at an early stage where Big Local areas hit problems
- We will make use of our research and evaluation capacity to review and evaluate new and existing approaches to delivering and supporting Big Local, and using that to inform continued improvement in how we deliver our work.
- We will review our theory of change to ensure that it reflects the learning we have gained from the first five years of the Big Local programme.



- We will develop closer and more direct relationships with Big Local areas so we better understand their aspirations and the extent to which current support arrangements are helping them reach their goals. [see priority 1]
- Where partnerships are unable to deliver Big Local without additional help, we will look at options to intervene and support fast turnaround, whilst ensuring that residents stay in the lead.

### **Priority 5: Influential, connected and informed**

6.3.5 We are seeing interest in Big Local become increasingly widespread, at a time when key components of its approach - place-based funding; radical devolution of power; and resident-led, collaborative approaches to service provision – are growing in importance as part of the public debate about the future of our communities.

Following the expected resolution of issues relating to the Big Local Trust Deed in the first part of 2018-19, we will significantly increase our work to share learning and experience from Big Local, with the aim of influencing and informing a much wider interested audience, including grant funders, policy makers and delivery agencies.

- We will develop and implement a learning framework for the organisation, seeking to systematise our approach to learning, both to help us manage internal learning, but also to understand how we can best meet the needs of others with an interest in learning from Big Local.
- We will broaden our range of research and learning partners, increasing the number of voices and perspectives on the Big Local programme, expanding our evidence base, and maximising the extent to which Big Local areas can benefit from involvement in and exposure to broader policy and delivery challenges.
- We will continue to build our relationships with funders, policy makers, practitioners and opinion formers [see priority 3], and increase both our attendance at external events and Local Trust-hosted activity, to increase knowledge of and interest in Big Local.
- At all times, we will favour an open, exploratory approach to our learning and research, avoiding going in with pre-conceived ideas or points to prove. Our focus will be on creating accessible, ideas-rich outputs – whether through events, multi-media/web content, reports or other channels; the priority will be creating content capable of generating wide interest, rather than dry academic reports.

## **7. Other strategic documents**

7.1 Two other strategic documents sit alongside this strategy – the Communications Strategy, the Research and Evaluation Strategy.

7.2 The Research and Evaluation Strategy outlines the purpose and direction of our investment in research work, in particular to:

- Provide a robust evidence base to inform the development and delivery of the Big Local programme, both nationally and at a local area level.
- Enable a culture of fast and responsive learning and improvement across everything that we do.

- Support the development of tools and methods to assist programme management and delivery.
- Enable regular and timely data collection and analysis to enable progress to be monitored and the impact of specific elements of the Big Local programme to be assessed.
- Enable the long-term tracking of change in our areas, and amongst those involved in the Big Local programme, against our overall theory of change.
- Provide wider understanding of the changing context in which Big Local is being delivered, for both Local Trust and those working in Big Local areas.
- Ensure that learning from Big Local informs and influences policy and practice on place-based funding and community development.

7.3 The Research Strategy was considered and approved by trustees in 2017, and will be monitored and kept under review by the Research and Evaluation Advisory Group, which includes trustees, Local Trust staff and a range of external experts and advisors providing input into our overall approach to knowledge and learning.

7.4 Pending the resolution of issues relating to the Big Local Trust Deed, Local Trust has been working to an interim Communications Strategy with four main themes:

- Local Trust identity: repositioning ourselves as experts, drawing on learning gained from delivering Big Local
- A shift to relationship-based communications: a new focus, shared goals and way of working
- Contributing to our knowledge and learning focus: articulating the value, meaning and relevance of Big Local
- A drive for content: developing engaging stories and evidence of impact that will travel further than before.

7.5 An updated version of the Communications Strategy will be brought to Board during 2018-19, taking into account the resolution of outstanding Deed issues, setting out how we will increase Local Trust's working around influencing, partnership working and collaboration building on the learning and insight gained from Big Local areas across the country.

### **Local Trust activity that is not part of Big Local**

The overwhelming balance of Local Trust's business relates to the delivery of Big Local – all but £500k of its £185m in assets (as at 2017-18) relate to the delivery of the Big Local programme.

The Strategic Plan set out above therefore focuses solely on Local Trust's plans to deliver the Big Local programme in its core role as the sole delivery agency for the Big Local Trust.

Whilst Local Trust does not actively fundraise or seek to extend its role beyond the direct delivery of Big Local, in 2016, Local Trust received £596k from the Community Development Foundation as part of its legacy on closure. This is managed and accounted for separately from the Big Local Endowment.

A small part of this funding has been used to support the commissioning of broad-ranging research into the future of community development. This work will report in 2018-19 and is intended to provide contribution to ongoing thinking about the future of community development, consistent with the ambitions of the Community Development Foundation; informing the development of future research priorities; as well as actively informing and complementing Local Trust's core mission of delivering Big Local.

Whilst expenditure relating to this work is separately accounted for by Local Trust, as the funding amounts to only 0.14% of total activity/turnover by Local Trust during 2017-18, a proportion that is unlikely to rise significantly in the future, no separate plan has been prepared.

### **Local Trust**

Local Trust is a national charitable company limited by guarantee, Company no. 7833396, charity no. 114751. Our contact details are: 020 3588 0565, [info@localtrust.org.uk](mailto:info@localtrust.org.uk) [www.localtrust.org.uk](http://www.localtrust.org.uk)  
Local Trust was established in 2012 to administer the Big Local Trust endowment - £217m provided by the Big Lottery Fund: the largest single-purpose Lottery-funded endowment ever made.

### **Big Local Trust**

Big Local Trust is an unincorporated charity governed by a trust deed, charity no. 1145916. Local Trust is the corporate trustee of the Big Local Trust and established Big Local Trust with the Big Lottery Fund.

### **The Big Local Trust Endowment**

The Big Local programme is wholly funded from the Big Local Trust endowment. In managing the endowment, Local Trust's aim is to guarantee, first and foremost, that the £1m promised to each of the 150 Big Local areas is not put at risk; ensure that Local Trust has the necessary resources to effectively administer the programme on the basis envisaged by the Big Lottery Fund at the time of the establishment of the endowment (set out in Schedule 8 of the Big Local Trust Deed); and to provide support to areas at least to the level outlined in the original Big Local Business Plan.

Subject to the achievement of those priority objectives, it aims to maximise returns through the wise investment of those funds in order to provide additional resources to support all of the above objectives over the lifespan of the Big Local programme 2012-27.

### **Other funding**

In 2016, Local Trust received £596k from the Community Development Foundation as part of its legacy on closure. This is managed and accounted for separately from the Big Local Endowment.

### **The Protector**

A protector is appointed by the Big Lottery Fund and funded from the Big Local programme. 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. At the time of preparing this plan, the post of Protector is vacant.

### **Big Lottery Fund**

Big Lottery Fund, the largest of the National Lottery good cause distributors, has been rolling out grants to health, education, environment and charitable causes across the UK since its inception in June 2004. Full details of the work of the Big Lottery Fund, its programmes and awards are available on the website: [www.biglotteryfund.org.uk](http://www.biglotteryfund.org.uk)