

GMS consultant tender

About Local Trust

Local Trust was formed in 2010-12 to administer and support 150 areas in England that the National Lottery Community Fund had identified as historically 'missing-out' on lottery and other funding. Each of the areas was allocated £1 million of Big Local funding which they can spend in any way they chose, provided local residents organised themselves locally to plan and manage that funding, involving the wider community in that decision making.

Big Local is our main programme (we administer another smaller scale place-based funding programme) and in the last six years we have overseen its successful launch, 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.

Most importantly, Big Local is providing compelling evidence of what can happen when you release the energy and initiative of residents to transform the communities they live in. Big Local areas all have plans in place to guide their work, and most have moved successfully from set-up towards the main delivery phase of activity. From September 2019 Big Local areas will be increasingly focussed on delivery and close out to the end of the programme.

We are focussing relentlessly on providing Big Local areas with the best possible support and working to ensure that this support reflects and is informed by their changing opportunities and needs. We are a spend-out programme, expecting to close down in 2026/27, and our strategy reflects a sense of urgency to provide the best support we can, share learning and influence our sector while we can.

At the same time we are also thinking about the future of Local Trust as an organisation and its place within the context of increasing conversation and consensus around future local, resident-led approaches to positive social change.

GMS review

Now we are at the half way point of the programme, we have decided to undertake a first review of our grants management system – to explore our needs now and into the future, to ensure we deliver Big Local to the highest possible standards.

The review will look at the extent to which our current system supports all areas of programme operations now and in the future. This will include how we best capture and use information that flows through the programme, including from local resident-led partnerships, the 'locally trusted organisations' that manage and administer Big Local funding and from our consultants and partners, including local reps and assessors.

Our ambition is to have systems in place that are well positioned to support the Big Local programme now and could potentially support other place-based resident-led programmes into the future.

We are open to all options on how we might proceed, which may include retaining our current system.

We intend to undertake our review and options appraisal over the remainder of 2019, with associated improvement plan (if relevant) agreed by March 2020.

Our current system

We currently use a version of Flexi-grant adapted to support our grant making. The 'Big Local Community' allows us to:

- Accept online funding proposals from the organisations managing Big Local funding
- Manage the assessments process and collaborate with external assessors
- Manage the decision-making process, issue grant offer letters and set budgets
- Gather reporting information, including on expenditure against offers, and
- Export and analyse data.

Most significantly for us the Big Local Community enables local resident-led partnerships to view funding information and expenditure reports in simple and user-friendly format.

Flexi-grant is managed by Fluent Technology.

Our Objectives now and in future

Effective grants management is a fundamental and core purpose of our work.

We value the ability to learn and adapt. We aim to make better use the information we hold to improve the way we manage the Big Local programme for our users and Local Trust staff.

Our approach as a funder is based on relationships and trust, with an approach that is flexible and proportionate. In line with this, our future approaches to grant management need to:

- Support highly effective grant administration processes
- Be friendly and accessible for users, easy to use and understand and enabling 'self-serve' as much as possible
- Show us accurate data on each area 'at a glance'
- Improve the quality of information we collect
- Be capable of more powerful data analysis, helping us to gain insights to inform future programme improvements
- Compliment and speak to other systems we use
- Support effective risk management.

Support we need

Local Trust delivers the programme through a relatively small and busy team, supported by a range of expert partners and consultants. We are therefore seeking to commission a partner who is positioned to provide expert review and advice and to deliver the following:

- Work with all parts of our organisation in a collaborative process to analyse and confirm our present and future needs
- Create a list of costed options for us to consider, including advice on integrations with our other systems (e.g. Salesforce CRM, Time to Spare and Exchequer)
- Provide an analysis of how well each option meets our objectives, and advise on implementation steps

- Provide a clear recommendation for future grant management approaches within Local Trust and systems to support our objectives.

We will review options and come to a final decision on our approach by March 2020.

To enable us to meet this timeline we will require your work, report and recommendations to be complete by December 2019.

Budget

The indicative budget for the work is £10,000 - £15,000.

How to apply

Please send your response and CV to programmes@localtrust.org.uk by 5pm Tuesday 27 August 2019.

Your response should include:

- Your understanding of the brief and key issues
- Your approach, including potential outputs
- The names and profiles of key team members
- How you will report to us on your recommendations
- An outline timetable
- Your outline budget, including details of day rates and any fixed costs
- Your suitability as our partner organisation based on the relevant knowledge and experience you bring to the role.

Following submission we will schedule interviews with shortlisted bidders w/c 16 September and seek to appoint shortly after this.

Local Trust – concurrent systems

Salesforce CRM - we are implementing a new CRM system designed primarily to support our communications, policy and partnerships teams to inform policy and practice on the future of local communities.

Website re-design - we have recently designed and launched a new Local Trust website.

Time to Spare - we are using this innovative system to develop a picture of activity within the Big Local programme in a more organic way. Time to Spare tracks our networks and enough data to give an at a glance outlook of engagement with each area.

Exchequer - our finance and accounting system is integrated with the Big Local Community enabling us to directly import payment information on a weekly basis.

Further information

Local Trust

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