

Capturing lessons from closure - Invitation to tender

Local Trust is seeking an external partner to undertake a learning review of our approach to organisational closure, capturing lessons, reflections and practical insights less than a year before our planned dissolution in 2027.

Overview

1. Founded in 2012 by the National Lottery Community Fund, Local Trust was established with a £217 million expendable, time-limited endowment¹ to deliver the Big Local programme.
2. Over the last 15 years we've been supporting 150 communities across England through long-term, resident-led investment and have become one of the UK's leading place-based funders, generating significant learning about community power, neighbourhood change and long-term investment.
3. The Big Local programme closed in March 2026, and Local Trust is now in the final year of its planned organisational life, with closure scheduled for February 2027. We started thinking about and planning our closure in 2021, managing this as a strategic programme of work in its own right. While continuing to meet our commitments to Big Local partnerships, we have sought to close the organisation in a way that is transparent, fair, well managed and aligned with our values.
4. We believe that now is a good time to distil and synthesise this experience, with potential to offer important learning in documenting and critically examining Local Trust's approach to closure, before the organisation ceases to exist.

¹ The endowment formed the Big Local Trust, of which Local Trust is the single corporate trustee. The majority of our operations over the last 15 years have been through the Big Local Trust eg grants, employment of staff, operational costs – but we are generally known as Local Trust, delivering the Big Local programme.

5. As an independent charitable trust established to deliver the Big Local programme, trustees were not only committed to concluding the Big Local programme well, but to leave a legacy of learning that will benefit others. This commission forms part of that ambition.

Purpose

6. There is little practical evidence about how foundations, endowed organisations and other time-limited institutions should plan and implement organisational closure.
7. Most published material focuses on governance, legal processes or financial spend-out. Far less has been written about leadership, culture, workforce planning, decision-making, communications, organisational identity, legacy and the emotional dimensions of organisational endings.
8. We want this commission to help fill that gap. We are seeking an independent partner to use Local Trust as a live case study to answer a broader question: *'What does good organisational closure look like?'*
9. The commission should produce practical lessons that is useful to other organisations planning a spend-out or managed closure.

Scope

10. The work is likely to include:
 - A review of strategic documents including the Closure Strategy, Legacy Strategy and related governance papers;
 - Interviews with trustees and staff;
 - Engagement with selected external partners and stakeholders;
 - Comparisons of Local Trust's experience with other spend-out foundations where appropriate;
 - Identification of key themes, dilemmas and examples of good practice; and
 - The production of a final report

Key questions

- What principles have been most important in shaping sound decisions and the overall approach?
- What has worked particularly well?
- What unexpected challenges have emerged?
- How has planned closure affected organisational culture and staff?
- How have we balanced delivery with planning for closure?
- What might we have done differently?
- What reflections might help other organisations in a similar situation?

Timetable

11. Our proposed timetable is as follows:

ITT issued: July 2026	July 2026
Deadline for receipt of tenders	Midday 4 September 2026
Potential interview dates <i>(online or in person in London)</i>	8 & 9 September 2026
Appointment of contractor confirmed	September 2026
Fieldwork	September – early November 2026
Interim findings	November 2026
Final outputs	December 2026

The provider

12. We are looking for someone that has:

- experience of organisational learning and research
- understanding of philanthropy and foundations
- expertise in qualitative research and facilitation
- excellent written skills
- relevant experience or demonstrable interest in the closure of voluntary/community organisations or funder

Budget

13. Indicative budget: £15,000–£25,000 (inclusive of VAT where applicable).

To express interest in this work, please submit a short letter outlining relevant skills and experiences in line with the criteria above and attaching a summary project plan by midday on Friday 4th September 2026, to info@localtrust.org.uk. Please include the name of a referee, and links to any relevant examples of your work. Please also include ‘Lessons from Closure’ in the subject line.

If you would value an informal conversation with a member of the Executive team during August about this work ahead of submitting a proposal, please also email info@localtrust.org.uk.

You can find some publicly available documents including our Business Plans and headline Closure Strategy on [our website](#).

