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Greenmoor Big Local

Feasibility Study into potential locations and functions for the Greenmoor CIO;The Legacy Project

Report, May 2019

Contents

Page number

1.	Scope of the work	3
2.	Scope of Research	3
3.	Key Findings from Community and Stakeholder Research	5
4.	What form of CIO should be adopted?	5
5.	Options for the location of Big Local and Greenmoor CIO	7
6.	Potential Role and Functions of the CIO	11
7.	Working in partnership	18
8.	List of Recommendations	19
9.	Timetables for transferring LTO function and setting up CIO	21
10.	Costs of office and staffing recommendations	27
11.	Outline 5 year Business Plan for GCIO	23
12.	Conclusion and Next Steps	26

Appendices

<i>(i) Local Trust Guidance on taking on LTO Responsibilities</i>	27
<i>(ii) Examples of staffing structures in other Big Local areas</i>	28

1. Scope of the work

The aims of the feasibility study are to:

- (i) identify a building, or space within a building, that could be used as a base for Big Local, and their staff, and for the staff of any successor body such as a CIO
- (ii) To ascertain the best way forward, e.g. to buy or lease the building, based on a cost-benefit analysis
- (iii) To identify what services, functions activities a CIO/similar body, operating out of that building, could provide, or more likely commission and how they could be funded

Outcomes

The outcomes have been agreed as

- An audit of community buildings and facilities
- Semi structured interviews with stakeholders and stakeholder organisations (agreed by the Board)
- A short survey of community groups
- An analysis of how other Big Locals have incorporated and/or taken on assets
- An audit of possible suitable buildings or spaces within buildings
- A cost benefit comparative analysis of those buildings (including options such as renting, buying or leasing a property)
- An analysis (based on current needs and activities) of what functions a CIO/similar organisation could provide
- An open day (or mini roadshow) to display the feedback from the research with recommendations and proposals

Timescale

The work was commissioned in January 2019, to be completed by end of April 2019

2. Scope of research

- (i) Interviews with community groups
 - Friends who care/ Kantilal Mistry

- Khidmat Centre
- Alpha United
- Lidget Green HLC
- Scholemoor Beacon CIO
- Hilton Road Group
- Great Horton Community Partnership
- Anand Millan Centre

Interviews with service providers

We have spoken to

- Khidmat Centre
- St Wilfrids Church
- Great Horton Stay at Home scheme
- Lidget Green Health and Well Being Centre
- Ridge Medical Centre
- Bradford South Area Committee /BMDC Shafiq, CLLD
- Royds
- Toni Williams, BMDC Public health
- Bradford CLLD

Community facilities audit

We have spoken to

- St Wilfrids Church
- Scholemoor Community Centre
- Khidmat Centre
- Lidget Green Health and Well Being Centre
- Ukrainian Centre

3. Key Findings from Community and Stakeholder Research

The list below highlights the key issues to emerge from our consultations so far:

- Whilst there are some activities in the larger centres such as Scholemoor Beacon (dedicated youth staff) and Khidmat, there appears to be a shortage of activities and facilities for younger people
- There is a significant and varied level of provision by way of community services and activities, but it is rather fragmented
- Activities around welfare, advice, young people, tutoring are being delivered by at least 3 different providers in the area
- Unusually for a Big Local area there are already quite a number of key stakeholder organisations operating in the patch, including 2 CIO's and a thriving community resource centre
- Relations with the area seem quite positive, between residents and partner organisations
- The exception to this is the relationship between parts of the Council and the Big Local, where trust appears to have broken down on both sides
- There is a good supply of community space across the area; the Beacon Centre, the Community Room at the Mosque and Khidmat (very busy), Ukranian Centre, and St Wilfrids church (underused, particularly during the day) and there is a lot of spare capacity
- One of the growing demands in the area appears to be around support for new immigrants, and refugees, and a related need for translators
- Another area of demand and need are projects around health and well-being, a potential area of activity for Greenmoor Big Local or the CIO.

4. What form of CIO should be adopted?

(i) CIO model

Greenmoor has just established a new CIO, the model that has been adopted being a Foundation model. We understand from discussions with members that they would like some analysis of the pros and cons of an alternative CIO model, i.e. compare and contrast with the alternative "Associate" model.

The Foundation and Association models

Foundation model

This model is for charities who's only voting members will be the trustees. A CIO using the 'foundation' model will be like an incorporated charitable trust, run by a small group of people (the charity trustees) who make all key decisions. Charity trustees may be appointed for an unlimited time and they will probably appoint new charity trustees.

The 'association' model

This model is for charities that will have a wider membership, including voting members other than the charity trustees. A CIO using the 'association' model will have a wider voting membership who must make certain decisions (such as amending the constitution), will usually appoint some or all of the charity trustees (who will serve for fixed terms), and may be involved in the work of the CIO.

There are not two different forms of CIO, hence a CIO with the 'foundation' model could change its constitution to the 'association' model if it wanted a wider voting membership, or vice versa. Whilst the Associate (membership model), is arguably more democratic, a foundation model, (which is the one chosen by other Big Local Partnerships e.g. Tang Hall, Leigh West and Woodland Speaks, is smaller, more streamlined, particularly in relation to decision making.

Recommendation

Greenmoor CIO adopts the Foundation model, with the option of switching to the Foundation model if Trustees deem this to be more appropriate at any time.

5. Options for the location of the Greenmoor CIO

The table below sets out the options we have identified as potential locations for the CIO and Big Local, together with an assessment of their strengths and weaknesses.

Potential location	Space available	Other comments
1. Lidget Green Healthy Living Centre (HLC)	Large room on first floor available, 44 square metres in total	Space would be sufficient, and available, and very competitively priced, and location is good, as it is reasonably central, and could tie in well with community activities being delivered on ground floor.
2. St Wilfrids Church, community hall	There is a good-sized room within the community annex to the church, with enough space for several desks, just off a main hall, and facilities include a fully functioning kitchen	Both the main hall and adjacent room spaces are underused, particularly during the day,
3. St Wilfrids Church, back of the main building	There is another room, at the back of the main church building, that could be refurbished and used full time as office space	The space is quite small, would require a significant amount of work to make it usable and there are issues around heating, light, and a lack (currently) of toilet facilities. The costs for St Wilfred's Church would be £500-£600 a month, i.e. £6000-£7200 a year, rates zero.
4. Khidmat Centre	Space is available, but very limited and not very comfortable	Location is not ideal, i.e. not central
5. Scholemoor Beacon	No space available at present.	CIO has funding to improve the building, this could potentially be used to adapt building for an office, location is good, and there is extensive space adjacent for outdoor activities
6. Commercial Office at Hamilton Road	Good space, but quite expensive and outside the area	
7. Commercial Office at Becks Lane	Decent space, meeting rooms and offices, but quite expensive and outside the area	
8. Ukranian Centre	A number of potential spaces available, in the main building, and within the separate building	Access to a good kitchen within the building, and the possibility of taking on additional rooms if these were required
9. Conversion of a disused house, or commercial building	Depends on the property-would provide the Big Local with an asset that could potentially generate sustained income streams.	Any disused property would be expensive to refurbish, additional support to cover some of the costs might be available.

From our initial research it did seem that St Wilfrid's Church community hall would be a strong candidate, with a very good space available, next to a sizeable hall and with very good ancillary facilities. However, further discussions have been held with the church and their committee have now decided they are reluctant to let go of this space. As an alternative they offered a room at the back of the church, just beyond the alter. However, this space is small, requires a lot of work and has issues around heating (stone floor and storage heaters), light, (limited natural light) and facilities (at present no kitchen, or toilets, although there are plans to address this within the church).

This then left the 2 strongest candidates as Lidget Green HLC, and the Ukrainian Centre. As we believe these to be clearly the 2 best options, we have gone into more detail into the strengths and weaknesses of each option in the tables below.

CIO Potential locations, Options analysis

1. UKRANIAN CENTRE		
Space available	Pros and cons	Cost
<p>The venue comprises a large building with two bar areas, three function rooms and a well-equipped kitchen with a number of office spaces on the first floor. There is a separate 2 storey building, with classrooms used occasionally for a supplementary school, a library, small IT suite, and a well equipped kitchen. Outside there is a large landscaped garden, seating area and a multi-use games area.</p> <p>A number of potential spaces are available. In the main building there are at least 2 potential offices that could be available. However, these are on the first floor, and it would be very difficult for Big Local or the CIO to create any kind of profile, or to tie in with other services, from this location</p> <p>A suitable space would have been the library, but this is no longer available. The owners have offered the use of 2 rooms on the first floor, that are currently used as classrooms</p>	<p>Pros</p> <ul style="list-style-type: none"> -Very good space, well lit -includes a room for an office (approx. 30 square metres), and a separate self-contained room, next door, (approx. 30 square metres) -additional rooms to expand if organisation grows -well managed building, with a full-time caretaker -good access to kitchen and toilet facilities -good outdoor facilities -Exclusive use of the school kitchen for 3 days a week and up to 15.00 on 2 days a week -Free secure, off the road, parking for a number of vehicles. -Use of the patio area and grounds for the breaks. -Own key to the building, subject to your agreement to follow the security and health and safety requirements. <p>Cons</p> <ul style="list-style-type: none"> -On the edge, rather than in the heart of the area -a rental arrangement would not create any revenue stream for the CIO -very expensive! (quote worked out on an hourly room hire rate rather than a long lease) 	<p>£400 per week, or 20,800 a year for 2 rooms, or 10,400 for one room (approx. 30 square metres)</p>

2. LIDGET GREEN HEALTHY LIVING CENTRE

Space available	Pros and cons	Cost
<p>The freehold of the HLC belongs to the owner and is leased to the Lidget Green walking group.</p> <p>A new kitchen is going in upstairs, which will be partitioned off, and there is the possibility of the CIO creating, via a partition, a separate meeting room.</p> <p>A space is available on the first floor, 60 square metres, of the building, that would take up all the space on that floor</p>	<p>Pros</p> <ul style="list-style-type: none"> -Good sized space, with room for a number of desks -well situated in the heart of the area -could help make the existing HLC more viable -potential for crossover in the services the HLC and the CIO provided -good access to kitchen and toilet facilities on the same floor -space is available immediately, additional conversion works would be straightforward. <p>Cons</p> <ul style="list-style-type: none"> -a rental arrangement would not create any revenue stream for the CIO access to additional rooms if needed -limited scope for expansion -Potential conflict of interest as owner is a Greenmoor Partnership member. -issues of anti-social behaviour in the neighbourhood 	<ul style="list-style-type: none"> -£6k per year for 5 years if paid as a one-off sum -£7.5k a year, plus £1.5k for all bills and insurances and other costs. -Furniture and Equipment: £3k -IT £2k -Creation of a separate meeting room, circa £2k. -total costs, 10k a year

Acquiring an asset option

Both the options outlined above require the CIO to pay rent to a third party, which whilst having the benefit of not requiring any capital funding, would not create any kind of asset, or ongoing revenue stream for the organisation. Which raises the sustainability question; when Big Local funding comes to an end in 2023, where would the money come from to meet the staff and other running costs of the CIO (The income from being an LTO would also come an end).

An alternative approach would be for Big Local could look to secure an asset, for example by taking on a disused/vacant residential or commercial property. This has been done in a number of other Big Local areas.

In Goldthorpe and Bolton on Dearne (Barnsley) they have used Big Local funds to renovate 2 houses, bringing the properties back into use, giving valuable jobs, skills and training opportunities to local young people, improving the environment and boosting local economy by using local companies for fixtures and fittings, and potentially generating an ongoing income in the form, of the rents received from the restored properties. In Kirkholt, they have acquired and refurbished buildings

Whilst Greenmoor could look to do something similar, using the refurbished property as part office and part space they could let out to third parties to generate income, the business case for such a project in Greenmoor would be challenging. Also, the area already has a lot of space that could be used for community activities or delivering public services. Any new space could potentially undermine those facilities and we believe any Big Local investment should be used, where possible to make existing community spaces and buildings more viable. Hence, we have not gone into any more depth to test the viability of this option.

6. Potential role and functions of the CIO

One of the 3 components of our brief was

To identify what services, functions activities a CIO/similar body, operating out of that building, could provide, or more likely commission and how they could be funded

(i) Analysis of local needs (as a guide to potential CIO functions)

On the basis that form should follow function, prior to exploring the potential role and functions of the Greenmoor CIO we undertook a desk-based needs analysis of the area, based on initial Big Local consultation and the use of the Big Local Insights tool.

Big Local consultation

Extensive consultation (over 800 surveys) was carried out when Big Local was launched back in 2013. Further consultation has been carried out since then, and it worth looking at what issues and priorities were identified at that time, which are set out in the list below:

- Improving access to sporting and healthy activities
- Reducing crime and ASB
- Reducing drug dealing
- Cleaning up the area
- Better community cohesion

Headline figures from the Local Insights Tool

Since these consultations were carried out, and the original profile written, Local Trust has made the Local Insights Tool available to all Big Local areas, which allows areas to compare themselves with the regional, the country and other Big Local areas. We have used this tool to highlight number of potential needs in the area, including issues where Greenmoor fares particularly badly relative to other areas, and these are set out below:

- Unemployment and claimant counts are Higher in Greenmoor than the regional average. E.g. Older unemployed (JSA/UC claimants aged 50+) (Nov-18) is 4.3% (the Yorkshire and The Humber average = 1.1%) and
- 12.3% of working age people from the Greenmoor area are claiming Workless benefits
- Between September 2017 and August 2018 there were 167.9 crimes per 1,000 population, compared to a regional average of 139.5
- Physical activity is lower and inactivity higher than the UK and the region (but not massively)
- The number of people with no qualifications is higher, and degree levels lower than the rest of the region and the UK. (10% above the regional average, 25-35%)
- 42.6% of people are economically inactive compared to a regional average of 31.6%
- A sense of belonging is low, a look at the community dynamics for the Greenmoor area shows a generally negative feeling around belonging, more so in the Scholemoor area

(ii) Possible CIO Functions

A unique feature of Big Local is that Partnerships do not be a panacea for all the problems in their area, a key characteristic that some organisations, particularly Councils, often find hard to grasp. However, the priorities of Big Local should reflect issues, needs and opportunities that have been identified, and some possible responses to these issues are listed below:

(a) How could the CIO help **develop a learning culture** for Greenmoor?

Unemployment is high, economic activity is low and there are too few people with qualifications-some local provision tackling these issues might be useful-what **training, volunteering and skills** development is available locally? What opportunities are there to enhance children learning at school? is very much the priority for the CLLD Programme, the CIO could put itself forward as a local delivery partner as part of a wider consortium.

(b) How could the CIO **help with encouraging healthier lifestyles?**

Obesity is high among children (locally and across the country) and rates of physical activity are lower than average in the area, is there a role for the CIO in helping encourage more physical activity which could have long term health benefits? Building on provision at Spencer fields, which has helped ensure there is plenty of green space, sports fields, and a hard surface Multi Use Games Area, which could be great resources for improving opportunities for physical activity, healthy living etc.

(c) Could the CIO find a role around **tackling isolation** (maybe linked to health and wellbeing initiatives)

Loneliness is a large and growing problem, not just locally but across the UK. Within Greenmoor a general sense of belonging people feel towards the area is low. This is also an area moving up the agenda within Big Local, with a programme of cluster workshops planned for later this spring, aimed at encouraging Big Local partnerships to look closely at what they could do in this area.

(d) Collaboration with/**support existing CIO's**

Clearly the Greenmoor CIO, in terms of its role and functions needs to try and ensure it complements rather than duplicates existing provision in the area. From the research done so far there would appear to be a case looking at the possibility of some form of consolidation of the various CIOs and organisations operating in the area. Or possibly the creation of a more strategic body under which these different organisations could operate, mostly independently.

The potential benefits of some form of collaboration, or amalgamation would

- the ability to take a strategic overview that funders, such as CLLD, the Health and Well Being partnership, Reaching Communities etc might find more compelling than a fragmented, possibly duplicating approach
- There could also be a strengthening of existing CIO's if their remit was extended and new members joined existing Boards, whereas a new CIO might, in some ways, dilute the efficacy of existing organisations.
- This would also be a good fit with the stated aim of Greenmoor CIO looking to bring additional money into the area, with this strategic function they would, arguably, have more credibility in this role.

Whilst there is likely to be resistance to such an approach, as existing organisations may not be likely to want to lose any autonomy, or maybe struggle to agree on a shared vision and priorities. However, having spoken to these organisations, there would appear to be some appetite for CIOs working more closely together, and potentially collaborating for example on funding bids, or joint projects

(e) Supporting local and community groups

Another potential function for the CIO is around helping existing groups in the area, in areas such as securing funding for their projects, providing courses around funding, other training, capacity building. From our discussions with groups in the area, whilst there is potentially a need, it is not clear how delivering such services could generate income flows for the CIO. Also, what income that could be generated (e.g. from charging a fee for the service), would be irregular and as such would not provide a sound financial footing for the organisation. This would then need to be secured from other functions (such as the income from being an LTO, roughly £5,000 a year). It will be difficult for the CIO to grow, e.g. gain support from social investors, funders, in the absence of contracted, as opposed to grant, income.

(f) Taking on the LTO function

A number of Big Local Partnerships have gone down the incorporation/CIO route (see below) and one of the findings so far from their experience is that those with a clear function, or functions, beyond being the LTO seem to be working the most successfully.

Other Big Local Partnerships taking on the LTO Role

Several Partnerships have gone down the route of becoming incorporated and becoming their own LTO; Tang Hall, Leigh West, Woodlands, St Matthews, Barrow Island, Worle, Beechwood, Scotlands, Bushberry, Mossley (these last three are Society for Community Benefit) and Whitley Bay etc. In these cases, the Partnerships set up CIOs to do this, although the CIOs have other responsibilities e.g. to manage assets in some cases.

Other Partnerships have set up CIOs (or similar) to take on other tasks (e.g. Goldthorpe's Housing project) but still have an external LTO.

Issues to consider

The Big Local Partnership should always be the body that makes the decisions (e.g. what to spend money on), whilst the LTO carries out these decision (e.g. purchases the item). The LTOs powers are given to them by Local Trust but only to support the Partnership.

The CIO should run alongside side, but be distinct from, the Big Local Partnership (although memberships will usually overlap)

Other questions to consider, and clarify;

- Who is the accountable body when the BL partnership, the LTO and an incorporated body are 'collapsed' into one organisation?
- Does this imply a greater role for Local Trust and/or the rep as there is no longer an independent body acting as a banker, overseeing what the Partnership does?
- How does the rep role change when the partnership, once becoming incorporated, takes on role, function, maybe an area, and monies, beyond big local boundaries or parameters?
- Not all Big Local Partnership members will want to be trustees of the CIO (they maybe unwilling, or unable, e.g. a bankrupt), that should not preclude them from the Big Local decision making

One potential drawback for the CIO, as a new organisation, is likely to be the lack of a track record, real credentials in any of these work areas.

We would therefore recommend that the CIO works very closely with the Big Local Partnership on what is arguably its one unique selling point, its membership of a Big Local family and network that covers the entire country and is focussed specifically at encouraging community led regeneration. As such the CIO has access to an extensive network of contacts across the Big Local area and, crucially, as a member of a much bigger Big Local 'Family', access to an extensive programme of support, and with privileged access to the Big Local networks of members, partner organisations, potential funders etc.

(iii) Existing service provision in the area

Having undertook an analysis of local needs, we then looked at what existing provision there was in the area, and where the gaps might be in local service delivery.

Unusually for an area of this size there are already at least 2 other CIO's in the Greenmoor area, Scholemoor Beacon and the Health and Wealth Being Centre. The aims and functions of each are set out below

Scholemoor Beacon CIO is a charity that works alongside local people to:

- Improve health and wellbeing
- Increase the wealth of the local area
- Bring the community together

Lidget Green Health and Well Being Centre

The Centre is a community hub in the heart of the Big Local area, offering a range of services including a walking club, ladies social club, arts classes etc.

Khidmat Centre

The main focus of Khidmat Centres is to address inherent inequalities in provision of services for the most vulnerable members of the community from minority ethnic backgrounds. The organisation achieves this through direct service delivery, partnership work, campaigning and influencing change at a local, regional and national level. The Centre offers a wide range of services including drop in sessions, services of the elderly (day care etc), health and well being activities for the over 50's.

The facilities include a sports ground, an indoor sports hall, meeting rooms, hall and training rooms.

Ukranian Centre

The venue comprises a large building with two bar areas, three function rooms and a well-equipped kitchen with a number of office spaces on the first floor. There is a separate 2 storey building, with classrooms used occasionally for a supplementary school, a library, small IT suite, and a well-equipped kitchen. Outside there is a large landscaped garden, seating area and a multi-use games area.

A range of activities go on at the Centre, including a supplementary school.

St Wilfrids Church

The church has one big community hall, and this can be partitioned off to create a smaller, separate space. This space could be suitable for an office and could fit in a number of desks. It is used by a variety of groups, slimming world, jujitsu, the Hindu group, although no longer used as a youth club

Can seat 120 in the main hall, with tables and chairs. The hall is regularly booked at on a Friday and Saturday night for parties, has booking in the evenings and is busy on a Sunday morning. There is also a families and children session (not sure when).

(iv) Possible gaps in existing service provision

From the research we have carried out, there would appear to be a number of gaps in terms of local service delivery in the Greenmoor area (in common with most deprived urban areas in a time of ongoing budget cuts), particularly around health and well-being, training and employment.

(a) Health and well being

There is no GP Practice in the Greenmoor area, the 2 closest practices being 'The Ridge' practice and the Mayfield Medical Centre, Clayton. Looking at the needs analysis there are clearly needs around obesity, isolation etc that are either not being met, or are being so in a fragmented fashion.

From discussions we have had with the manager at the Ridge Centre, there are significant changes that have recently been put in place around the ways in which health, well-being and other related service are being delivered across the Bradford Metropolitan area. The district is being divided in Community Partnership areas, badged as "exciting opportunities available to you in your area with this new approach to delivering health & Social Care. Help develop the projects and priorities that will improve the health & wellbeing of our local community – what matters to you?" Greenmoor is in the Community partnership 7 area, with Horton Park, Parklands and Buttershaw. The main co-ordinating body for the provision of these services and activities is likely to be Royds, with some commitment to the establishment of more local community hubs to help deliver health and well-being services. Research done in the CP 7 area suggests that a priority is loneliness and social isolation. The first stage in the programme of work will be a mapping of existing provision of services and initiatives around health and well-being the area.

Also, CNET have just produced a Healthy Lifestyles Research report, covering a number of postcodes in Bradford, including BD7, and from February to October are looking to deliver interventions around weight management, cooking, sports sessions,

(b) Education, training and employment

From our research so far there also appear to be gaps around post 16 education, and services related to support into work, learning and training. We have had discussions (as have Greenmoor Big Local) with the manager of the Bradford CLLD (Community Led Local Development) Programme. The Programme, which covers three wards: Great Horton, City

and Manningham, is aiming 'to, improve economic development and competitiveness, and one of the requirements of the programme is that any project has to provide matched funding. This would suggest Greenmoor could be in a relatively strong position to benefit, given its access to Big Local funding, and the CLLD Programme are very keen to talk about potential joint projects/working.

The priorities for the programme are

- Individuals back into employment
- Business and enterprise support (a spoke in every locality)
- Traineeships and apprenticeships (focussing on the most vulnerable in the labour market)
- Developing local business networks
- Marketing and attracting investment

Recommendation

Greenmoor could consider being the lead organisation for a bid, or perhaps more realistically, being a partner in a wider consortium

7. Working in partnership

From extensive experience of working very closely with a large number of Big Local Partnerships, we firmly believe that the relationship between the council and Big Local can often be crucial. Whilst in Greenmoor it does work well at certain levels, there is definitely room for improvement, which could be brought about simply by improving communication channels and clarifying what the priorities for Big Local area and developing ways in which the relationship could become closer, and more mutually beneficial.

A good reputation and image will be crucial not just for Big Local, but the CIO, as without it there could be a reluctance to fund, invest in, or work with the organisation.

Given the importance of all Big Locals 'being resident led and working in Partnership', and given how important a good relationship with the local council is, we believe there is a very strong case for create a space in which the relationship between the Big Local and some external organisations, particularly the council, could be improved. We would be happy to help organise that as part of this brief, and facilitate the discussions, aimed at improving relations between the various

parties, based at least in part on creating a better understanding, on all sides as to what they are looking to achieve in the area.

Recommendation

We could help organise and facilitate a discussion with BMDC and other Stakeholders around creating a greater shared understanding of each other roles, ethos and priorities.

8. List of Recommendations

- 1. Greenmoor CIO adopts the Foundation model, with the option of switching to the Foundation model if Trustees deem this to be more appropriate at any time.**
- 2. Greenmoor CIO is based at Lidget Green Health and Well Being Centre**
- 3. The CIO becomes the LTO for the Big Local partnership in 2020, subject to the guidelines set out below;**
 - Greenmoor CIO needs to meet all the requirements of Local Trust (see appendix)
 - The decision to switch LTO to the CIO must come from the Big Local Partnership (not the CIO), on the basis of a majority vote of members, in the absence of unanimity.
 - This decision should be taken in the context of a discussion of the pros and cons of different options.
 - There needs to be clarity around the respective roles, functions and membership of the CIO, and the Big Local Partnership
 - There should be separate meetings of the CIO and Greenmoor Big Local
 - The CIO reports to the Partnership, during the lifetime of the Partnership.
 - Membership of the CIO, and Partnership needs to be clear (some, although not all ideally) will be members of both
 - When reporting to the Charity Commission, the Greenmoor CIO must focus on what it does, as opposed to the work of the Big Local Partnership functions
 - Greenmoor CIO members undertake training to ensure they understand the roles and responsibilities, and the risks, of being a Trustee.
 - As planned the Greenmoor CIO needs to develop other functions (e.g. the plan to bring money into the area etc) to help it develop its identity and track record. However, during the lifetime of the Partnership, the CIO should act as subsidiary to the Partnership.

4. GBLP considers the feasibility of matching the already available funds (£85k) to help modernise and extend the Scholemoor Beacon facility.

This could potentially be supplemented by support from the CLLD Programme. This would create a more viable centre (and potential community hub) in Scholemoor and balance out the availability of community venues across the Greenmoor area

This could create a more viable centre in Scholemoor and balance the out the availability of community venues across the Greenmoor area. The costs of this could be up to £80,000. Greenmoor BL Partnership could make a condition with regard to the sustainability of the Scholemoor Beacon e.g. that they have at least 1 to 3 years core funding in place and a sustainability plan for future years, before the match funding is agreed for the capital development.

5. The CIO and GBLP operate as distinct organisations, but share a staff member who manages the Big Local, develops the CIO and oversees the LTO function

6. Future CIO functions draw on its unique links with GBLP and Big Local nationally

7. Further work is done around the potential for GBLP and CIO developing and delivering (or commissioning) services around health and well being

8. An external organisation (we could help on this front) organises and facilitate a discussion with BMDC and other Stakeholders around creating a greater shared understanding of each other roles, ethos and priorities.

9. Timetables for new LTO arrangements and setting up the CIO

Timetable for transferring LTO arrangements			
Task	By who	When by	Notes/conditional on
Research into LTO options	Consultants	May 2019	Done
New LTO chosen; Greenmoor CIO (GCIO)	GBLP	June 2019	
GCIO review and develop policies and procedures	GCIO/CneT/Local trust	June 2020	Greenmoor CIO will need all policies, procedures etc in place, and all systems and processes needed to pass Local Trust Due Diligence test, and have plans re staffing, office, base
Application for change of LTO at end of Current plan made to Local Trust	GCIO/CNeT/ GMBL	June 2020	Three months notice needs to be given to existing LTO
LTO Due Diligence process	GCIO/GMBL/Local Trust	June-September 2020	Look at Local Trust processes, particularly the grant offer letter, understand roles and responsibilities in relation to managing the funds
GCIO becomes LTO for GBLP	GCIO/CNeT/ GMBL	September 2020	

Timetable for setting up and staffing CIO			
Task	By who	By when	Notes
GCIO based on GBLP needs/requirements develop and decide staffing needs	GBLP/ GCIO/CneT/Local trust	July 2019	Job Descriptions, roles and responsibilities, GCIO employment policies and duty of care policy to be developed.
GCIO office base set up	GBLP/GCIO	June 2019	Office set up: equipment. Furniture, services, leases etc

GCIO policy and systems put in place set up	GCIO	June 2019	Polices around health and safety, risk assessments, Equal ops, child protection (?), Set up bank account, appoint accountant, book keeper
Recruitment of GCIO staff (i) Company Secretary role:	GBLP/GCIO	June 2019	To support handover and take on of LTO Responsibilities
Recruitment of GCIO Staff (ii) Manager (part time initially) role	GBLP/GCIO	June 2019	Fundraiser, strategy development, community engagement role
Recruitment of GCIO Staff (iii) Support to manager and Big Local	GBLP/GCIO	March 2020	

10. Costs of office and staffing recommendations

We have assumed a five-year timescale for the staffing and rental costs below. Although the original budget for the identified £220,000 made mention of a three-year cycle, it makes more sense to consider the timescale in the window of the remaining life of Big Local we feel. The costs of course can be easily re-calculated to fit a three-year cycle.

Staffing

Greenmoor Big Local Partnership will need to consider what type of staffing, if any, they want the CIO to employ on their behalf. Most Big Local Partnerships have workers, either employed or contracted for them by their LTO or they directly employ or contract workers via their own LTO. An LTO has additional responsibilities to enact decisions of the Partnership, to account for spending to Local Trust (and the Partnership and any other funders) and to employ staff working on behalf of the Big Local Partnerships, providing administration and due diligence, the “Company Secretary” type role.

This means of course that the LTO/CIO has to employ extra people to do this, or members of the CIO must voluntarily take on these duties. An external LTO normally has an existing back office set up and staffing, which a new CIO/LTO has

to set up from scratch, hence there are additional costs, which cannot be recouped from e.g. the 5% value of spend that LTOs receive for their work.

11. Outline Business Plan for GCIO

The Greenmoor CIO is a considerable enterprise and so it needs a good quality Business Plan to guide it through the Big Local years (years 1 to 5) and thereafter. This will help to identify areas for development and where the financial pinch points are (mainly at the Big Local end point) and the time line and targets for income generation so that the whole thing does not terminate due to lack of funds at the conclusion of the Big Local programme.

We assume that there is a total Big Local pot of £423,000 remaining (based on a balance remaining figure of £552,275.40, quoted in the 2018-20 plan and an expenditure £128,500 in 2018-19). The total budget of the Legacy project as set out above is £307,000, but we estimate spend could be £290,000 over five years. The income for this will come from the Big Local Plan income plus, if/when Greenmoor CIO takes over the LTO role in September 2020, the 5% of spend that Local Trust gives for the costs of LTO work. For years 2 to 5 of the Legacy Project (which is years 7 to 10 of the Big Local programme) the potential income from the 5% is in the region of £14,000. This can offset the costs of the LTO function. Based on the above recommendations the following sets out the recurring and one-off costs and spend commitments and known income (ink estimates re 5% LTO income) across the whole of Greenmoor Big Local:

Year	Item	Cost	Income	Source of funding
2019-20	CIO Chief Officer/Fundraiser/Development Worker (3 days)	£20,000	£20,000	Big Local Plan
	CIO Office Costs (rent, bills etc)	£7,500	£7,500	
	CIO admin and other core costs (insurance, accounts, IT etc)	£2,500	£2,500	
	Scholemoor Beacon etc	£80,000	£80,000	
	Big Local projects	£32,850	£32,850	
	Total	£142,850	£142,850	
2020-21	CIO Chief Officer/Fundraiser/Development Worker (ft)	£35,000	£35,000	BL Plan and LTO 5%
	CIO Office Costs (rent, bills etc)	£7,500	£7,500	
	CIO admin and other core costs (insurance, accounts, IT etc)	£2,500	£2,500	
	Big Local projects (CLLD etc)	£32,850	£32,850	
	Totals	£77,850	£77,850	£3,893
2021-22	CIO Chief Officer/Fundraiser/Development Worker (ft)	£35,700	£35,700	BL Plan and LTO 5%
	CIO Office Costs (rent, bills etc)	£7,500	£7,500	
	Big Local projects			
	Totals	£43,200	£43,200	£2,160

2022-23	CIO Chief Officer/Fundraiser/Development Worker (ft)	£36,400	£36,400	BL Plan and LTO 5%
	CIO Office Costs (rent, bills etc)	£7,500	£7,500	
	CIO admin and other core costs (insurance, accounts, IT etc)	£2,500	£2,500	
	Big Local projects	£32,850	£32,850	
	Totals	£79,250	£79,250	
2023-24	CIO Chief Officer/Fundraiser/Development Worker (ft)	£37,000	£37,000	BL Plan and LTO 5%
	CIO Office Costs (rent, bills etc)	£7,500	£7,500	
	CIO admin and other core costs (insurance, accounts, IT etc)	£2,500	£2,500	
	Big Local projects	£32,850	£32,850	
	Totals	£79,850	£79,850	
Totals	£423,000	£423,000	£14,008	

Total Big Local Plan balance 2019-25	£423,000
Total costs above	£423,000
Total of 5% (LTO Fee)	£14,008
Total Income	£437,008

Extrapolating costs in this way illustrates that there is £162,500 available for wider Big Local projects outside of the recommendations for the Legacy project and also contributions to CLLD might take some of this funding, leaving little room for manoeuvre and giving further impetus to the need to bring more income into the area.

This proposal provides for staff time to a) manage both the Partnership and CIO support roles; b) provides book keeping, financial returns (taking on LTO responsibilities); c) to fulfil new role of developing local partnerships and bring money into Greenmoor.

12. Next Steps

The report will be presented to the Big Local Partnership on May 2nd, and the recommendations set out in section 8 considered by the Partnership members.

APPENDICES

(i) Local Trust Guidance re taking on LTO Responsibilities

Local Trust have produced guidance for areas who wish to take this route <http://localtrust.org.uk/library/programme-guidance/big-local-partnerships-becoming-their-own-locally-trusted-organisation/> and we have attached this guidance to this report.

Local Trust Guidance

The Local Trust guidance poses several issues to consider and challenges to meet:

- Do you have the right mix of skills around the table? How do you ensure that?
- What specialist support and advice will you need?
- How do you involve other people in Big Local?
- How do you ensure that you have the right procedures and processes in place? This includes
- financial processes, reporting to Local Trust, complaints procedure, staffing.
- Is there any distinction between the partnership and the locally trusted organisation?
- How can people within the Big Local area have oversight of the organisation and the
- partnership?

Local Trust also have Due Diligence checks that any new LTO has to meet:

- Is the organisation a legal entity and does the act of being a locally trusted organisation fits within its objects – we ask for the organisation's governing documents
- Does the organisation have experience and capability to administer and account for the funding – we ask for the
- organisation's most recent set of financial accounts and use these to check the organisation's

- financial position: Does the organisation have a bank account in the name of the organisation with at least two signatories who are not related to one another or reside at the same address – we ask for a signed form to show the account and signatory details, as well as a copy of a cheque or paying-in slip as evidence of the account details
- Does the Organisation have the capacity to support the partnership in its role as locally trusted organisation – we ask how the organisation was chosen and the working relationship between you.

There is a lot of guidance on the Local Trust website about the roles and responsibilities of being an LTO and the Greenmoor CIO needs to be fully conversant and understanding of what these are:

<http://localtrust.org.uk/library/programme-guidance/locally-trusted-organisations/>

<http://localtrust.org.uk/library/programme-guidance/managing-big-local-funding/>

<http://localtrust.org.uk/library/programme-guidance/vat-guidance/>

(ii) Examples of staffing structures in other Big Local areas

Job Descriptions and costs vary across the Big local spectrum, e.g.

1. Warwick Ahead: Community Engagement Worker

The purpose of the Warwick Ahead Community Engagement Worker is:

To raise awareness of Warwick Ahead Big Local within the community and to build relationships with local people, groups and organisations.

To support and encourage residents and local groups to take a positive and active role in community life and in Warwick Ahead Big Local, supporting the Partnership with the development and progress of the Community Plan.

To work as part of a team with workers, volunteers and agencies in achieving the Community vision of Warwick Ahead Big Local Partnership.

Hours Part time 21 hours per week

Salary £26,000 per annum (pro rata)

2. Greatfield Big Local

Coordinator 24 hours, £25k pro rata

Purpose: The post holder will play a critical role in supporting the Partnership in the delivery of the Greatfield Plan.

3. ChART Lewisham Big Local

Job Title – Community Development Coordinator

Salary – £13,816 for an 18-hour week (Linked to NJC Scale 6, £26,865 Full time equivalent)

Role – The role of the Community Development Coordinator is to provide project management support to help deliver the ChART Big Local Work programme. During 2018 it is envisaged that the post will significantly focus on developing the new local priority of developing Routes out of Poverty for residents of the ChART area.

4. Kirkholt Big Local

Community Organiser 30 hours at SCP 29-32 (£25,951 - £28,485 Pro Rata)

- Listen widely to people of all ages and backgrounds and engage them in meaningful conversations which enable their voices to be heard, transforming their ideas into projects and enterprises, which build on strengths, meet needs and aspirations and tackle concerns in the community.
- Support the development of volunteer teams who will listen in the community, research, plan and take coordinated action.
- Work with the Chair/Board to support the development of the big local Partnership. This will include providing secretarial support to the partnership and its various groups; arranging training and development opportunities; ensuring good governance; undertaking inductions for new partnership members; maintaining appropriate records and reports on work undertaken and presenting these to the Partnership.

5. Leigh West (like Tang Hall have their own CIO as LTO)

Project Officer: 3 days: £200 a day: all aspects of support to the Partnership plus meeting admin, minute taking, agenda and papers, point of contact etc

Finance Officer: 2 days: £200 a day: all finances, LTO work, Reports, claims etc

Marketing: 1 day a week: social media, newsletters etc

Staff budget 2018-19 £60,000

Woodlands Speaks (Doncaster) and St Matthews (Leicester) are similar in that they have their own LTO set up.

There are plenty of examples of finance and admin jobs in the Charity Sector:

- E.g. Secretary and Admin to the Trustees, Lloyds Foundation. 10 or 12 hours a week, peaks and troughs of work, dealing with queries, application, admin for meetings, etc £20/25 per hour home based
- HFT Admin assistant, 30 hours finance, admin, typing etc £18k pro rata, London
- DASH Finance and admin, typing, finance records, website, publicity, £17.5k , 20 hours, Wales
- Team Assistant Youth Charity, Surrey, records, admin, point of contact, support meetings, FT, £11 an hour

(iii) What policies a CIO may need

Some or all of these would be essential for Due Diligence purposes

- Financial controls and Reserves
- Employment and recruitment
- Commissioning and procurement
- Conflict of Interest
- Risk Management
- Serious incident
- Expenses
- Confidentiality

- Comments, compliments and complaints
- Safeguarding
- Health and safety
- Environment and sustainable development
- Equality and Diversity
- GDPR/Data Protection