Local Trust | Big Local

The Big Local Plan

The change you want to make and how you will go about it

Your plan is a document you write for yourselves, your community and Local Trust. It is a guide and action plan that your partnership can follow, share and use to get others involved.

From September 2019 any new Big Local Plan should have three parts. (If you are applying for additional funding or changing your LTO mid-plan this does not apply to you).

- The **costed vision** looks at things in a big picture way. It is a chance to reconsider your original vision and priorities, and how you can allocate your remaining funds to achieve them. All costed visions will show, in a broad way, how the full £1million will be spent by the end of the Big Local programme in March 2026.

- Your **action plan** will contain the most detailed information about how you will deliver Big Local in your area – like a manual for delivery. The length of the plan is up to you. It can span the rest of your time as a Big Local or cover a shorter period. It sets out your goals and activities for the next funding period and shows how you will achieve your overall vision. It includes a detailed budget that we use to make your next funding offer and payment schedule. You can update or create a new one as each funding period comes to an end.

- Your **legacy statement** outlines what you hope and plan to leave behind post-Big Local. By legacy we mean what remains when the Big Local £1 million is spent.

Depending on how much your Big Local has spent so far, you will probably submit more than one action plan to us between 2019 and the end of the programme. Yet your costed vision and legacy statement – which we'll ask you to re-submit each time – will likely just need a little updating.

How do we create a Plan?

The Plan can look however you want it to, providing it has the three parts and the information above, and is easy to read and understand. The foundation for your Plan is built on:

COMMUNITY FUND

- **The views you've gathered from a wide range of people in your local community**
  There are many ways to gather views and involve people locally, it could be through local events, community clubs, activities, a festival or BBQ, along with more formal consultation methods such as questionnaires and community meetings. You can read about ways to engage your local community on our website here.

- **Data about your local area**
  It's not difficult to find out information about your area that will help you develop a Plan, such as about jobs, services and housing. One way is with the online platform Local Insight.

- **All the things you've learned from your work together so far**
  Your review of your previous plan is a great starting point to gather your learning. You can recognise what is already good about your area, what has worked so far (and what hasn't) and what you're aiming to transform in future. You can read our guidance on plan reviews here.

Your Big Local partnership is responsible for creating the Plan. Throughout the process it is important to take views from a wide and representative range of the local community, and also ensure that you avoid conflicts of interest in any decisions that shape the Plan. The partnership can decide who then writes the Plan up – some partnerships do this themselves while others choose to commission external support for this. It's up to you.

You could also consider creative ways to package your Plan, grab attention and make clear what you are trying to achieve – such as good design, and accompanying film, audio, art, pictures or animation.

Creating your costed vision

How will your area look?

Are your priorities still in line with your community's priorities?

How do you know that this is the right vision?

How will you spend the remaining funds to achieve what you want?

Are there costs to consider linked to the close of Big Local?

Have you talked to a wide range of people in your community? Have you included what they've said?

Your vision is a short statement that describes what your partnership wants to have achieved in your area with its million, linked to a broad or 'indicative' budget.

- It is an opportunity to re-visit the overarching vision and priorities that you developed for the first plan and decide if they need updating.
- It should explain how you know this is the right vision for your area.
- It should 'cost' each of your priorities or each element of your vision, based on the funding you have left.
- Remember that you may need to put funds aside for costs associated with the close of the programme (see action plan, below).
- You can use the questions to your left to help shape your vision.
- If your funding will probably last to 2026, we'd recommend aiming to spend fully by September 2025, which gives you time for delays or to use an underspend.
- You can update your costed vision when you create each new Plan to fit the funds remaining and any changes you may have decided. We will ask for information on why and how you've done this.

We're asking for this so that partnerships have the best opportunity to use all of the funding (read our blog on spending out) awarded by the end of the programme in March 2026 when we will need to return unspent funds to the National Lottery Community Fund. (Remember that you don't have to use the full amount of Big Local funding if you don't wish to). And, as a simple document, you can use this and your legacy statement to communicate Big Local Plans to others.

Creating your action plan

You can then then create a more detailed action plan to sit below your costed vision. Your action plan can be for as few or as many years as you like, up to March 2026. We will use this to create a grant agreement with your LTO (the offer letter).

It's important that your action plan fits in with your costed vision. When you are moving to a new plan, or new opportunities arise and you want to make changes, you should use your costed vision as a guide.

Refresher: What is in a Big Local action plan and the supporting information?

- Your plan of action (What will you do, how you will work, who will be involved, what resources are needed and how these resources will be used well).
- Your budget for the next funding period (1, 2 or more years) with a 6-monthly payment schedule
- The start and end date of the plan and funding period (month and year)
- How you made sure of community involvement and buy-in.
- What your community needs and opportunities are.
- How your plan relates to Big Local outcomes.
- What contribution your plan will make to lasting change in your area.

It's also a good idea to include how you will measure and check your progress so that you know you are achieving what you set out to do – and during our assessment we look at how you have fed learning into your plan. You could also think about how you will communicate your plans to the community and the other people and organisations you want to reach.

Remember that in your last plan there may be some costs associated with the close of the programme, such as redundancy for long term staff. We have a simple checklist around funding essentials to consider towards the close of the programme, and your LTO and rep can also help.

Here's an example of the difference between the costed part of your overall vision and your action plan budget.

Total remaining for costed vision £450,000

Action plan budget is more detailed and fits with the costed vision. It is broken down by month, year and activity

Priorities	Year 1	Year 2	Year 3	Total grant	Next plan
Young people £50,000	Youth forum £5k Activities £4k Worker £12k	Youth forum £5k Activities £4k Mentoring £2k	Networks / legacy £2k Activities £2k	**£36,000**	£14,000
Community £75,000	Festival £7k Community groups £8k	Festival £7k Community groups £8k Community Centre refurb £10k	Festival £7k Community groups £8k	**£55,000**	£20,000
Open spaces £125,000	Park works £25k	Park works £80k	Park maintenance £20k	**£125,000**	£0
Social Investment £85,000		Work with Credit union £45k	Work with Credit union £30k	**£75,000**	£10,000
Support costs £65,000	Workers £10k Support costs £5k	Workers £10k Support costs £5k	Workers £10k Support costs £5k	**£45,000**	£20,000
Skills and Jobs £50,000	Jobs club £5k Apprenticeships £12k	Jobs club £5k	Jobs club £5k	**£27,000**	£23,000
Total costed vison **£450,000**	Year 1 Month 1-6: £46.5k Month 7-12: £46.5k	Year 2 Month 1-6: £130.5 Month 7-12: £50.5	Year 3 Month 1-6: £44.5 Month 7-12: £44.5	**Year 1-3 grant** **£363,000**	Left for next plan £87,000

Creating your legacy statement

Your new Plan should include a short legacy statement for your Big Local about the impact you believe that you'll have had, and what you want to have put in place by the end of your funding. This can be in any format and should answer the question/s:

- What will remain in your area after the Big Local funds have been spent?
- What are the main things – if any – that you want to do by then so that these changes are long lasting?
- What do you think this will mean for your area's future?

It may be useful to think of this change in terms of People (like skills, experience, motivation), Relationships (like networks, organisations) and Place (like physical assets or activities that will continue) – or in terms of your Big Local priorities. You don't need to go into detail into your statement to us, but the details will help you plan as a partnership.

. Questions that partnerships may discuss as they develop their legacy statement

- What does legacy mean to us?
- What's our vision of our area in the future, after Big Local?
- How will we have contributed to it?
- What are our strengths and our best likely outcomes?
- Which aspects of our impact and legacy will last of their own accord?

- Will any (like activities, projects or assets) need more attention and resources? If so, what resources do they need, and how will we get them?
- Does our partnership wish to continue in some form? What resources do we need, and how will we get them? Will we need to source our own income in future?
- Are there skills we could develop now, such as leadership skills, which will help our legacy to be stronger?
- How can we share our skills and experience with others?
- Are there any risks that we need to think about and plan for?
- How does our legacy fit with what's coming up in the future for our area?

We're asking for legacy plans firstly because at this halfway point in the programme it is a good moment to start planning. Secondly, we would like to collect information on legacy plans across areas so we can understand what kind of support we should develop and offer.

How to send in your Plan

When your three-part Plan is ready you need to send it in through the Community, our online funding system. We ask that you do this at least four weeks before you need funding, to allow time for our assessment and decision-making process (but this may be longer, depending on when you are able to meet with the Plan assessor).

As a checklist, you need to send us:

- ✓ Your costed vision
- ✓ Your action plan including priorities and activities
- ✓ Your delivery budget with proposed payment schedule, usually six-monthly
- ✓ The start and end date of the plan and therefore the grant agreement (month, year)
- ✓ Your legacy statement

If you have more than one LTO, each LTO should submit a proposal on Community for their part of the funding, attaching the relevant documents.

Assessment of Big Local Plans

We carry out assessments of your Big Local Plan to:

- Make sure that Big Local funding is being used for the benefit of your area
- Manage risk around the funding
- Provide useful feedback to partnerships
- Keep in touch with Big Local activities so that we can develop good support offers.

It is very rare for Local Trust to not endorse a Plan, and in these cases we'll work with you to resolve any problems and get a funding agreement sorted as soon as possible. Sometimes we will issue a funding offer but attach a condition to a payment (see more in our funding agreements guidance).

Assessments are carried out by a member of our assessment team of community development experts. They are an opportunity to get an honest outside view of your partnership and plan, and we've asked assessors to develop feedback for areas to highlight areas of strength and opportunities for growth.

As part of this process, the assessor will read your Plan (including your costed vision and legacy plan), speak to the rep and LTO, and may visit your Big Local area to meet your partnership and discuss the Plan (depending on whether it is a desk-based or visit-based assessment). They will also perform a due diligence check of the LTO, which looks at financial capacity and risk. They may help you to amend your budget if you decide together that something needs changing.

The kinds of issues we look at during assessments

- The level of community buy-in for your Plan
- How you can track your progress against the Big Local outcomes
- How you've been able to use learning from your last plans
- Whether your partnership meets Local Trusts' criteria
- Whether what you're planning and your budget is achievable, realistic and clear
- Whether your LTO and delivery partners are able to perform the role and have the capacity to do so

We will send feedback from your assessment with your offer letter. The feedback include reflections from the assessment and the positive things that really stood out for the assessor, as well as opportunities for improvement or development.

What happens after a Plan is endorsed?

We send an offer letter by email to the LTO, copying in the chair of the Big Local partnership and the rep. This letter:

- Confirms our acceptance of your whole Plan, including your costed vision and legacy statement
- Confirms the amount and dates of the next funding agreement we have agreed to award to your LTO on your area's behalf, in line with your action plan.
- Includes the grant terms and conditions, between Local Trust and your LTO
- Includes the payment schedule, which is based on your action plan budget and sets out when your LTO will draw down your funds (which is usually six monthly).

We then usually pay the first six months of this funding straight away (or once we get the signed terms and conditions back from your LTO, if these haven't been signed yet).

Then every six months (or when funding is next needed) we ask your LTO to complete a spend report. This updates us on what funding has been used so far and what's needed in the next payment period, so we can ensure they have the right amount of funding to deliver the Plan.

You can find more details on the funding processes – including how to make a change to your Plan once it is endorsed, or how to extend your Plan – in our guides: Funding agreements and processes for Big Local Plans, and How to submit a Big Local spend report.

To agree changes to your grant or Plan we will need to confirm that the Big Local partnership has agreed, and we will the reasons for the changes and that they are within the total amount of your grant (or link to variations info).

Moving between one plan and another

Before your plan ends it's important to have another one ready so that we can put a funding agreement in place. Please send us the plan at least **four weeks** before you expect it to start, so we can make sure there are no gaps in funding.

Before you start developing your new plan you should also complete a plan review, to reflect on what has worked and inform the new plan.

If your LTO has funds remaining at the end of your plan, you can either decide to:

1. Return any underspend to Local Trust so we can close the grant agreement. This money will be added back to your 'pot'

2. Extend the grant agreement, so that you and the locally trusted organisation(s) have longer to use the money. We would do this in agreement with the partnership, and for no longer than six months.

This document will be developed over time with input from the people using this material. If you have thoughts on how this document can be made more useful for you, particularly if you live in one of the Big Local areas, please let us know.

The endowment for the Big Local programme is held by the Big Local Trust and overseen by Local Trust. The Big Local Trust was established by the National Lottery Community Fund with a National Lottery grant of £196,873,499.

If you need this document in other formats or a community language please get in touch with Local Trust and we will help you.

Published by Local Trust, September 2019 Local Trust company no. 07833396, charity number 1147511 Big Local Trust charity number 1145916