

# **Big Local Annual Learning Review 2012 to 2013**

Final report

January 2014

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## **Authorship and acknowledgements**

This report has been written by Leila Baker, Ben Cairns, Ben Kyneswood and Marilyn Taylor. We would like to thank the Local Trust team for their comments together with Sarah Golden at the Community Development Foundation and Matt Davies at Renaisi.

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## 1. Introduction

This review sets out the findings of the second annual learning review of data collected by Local Trust and what this can tell us about progress towards the Big Local aim and outcomes.

### **Box 1: Aim and outcomes for Big Local**

#### **Ultimate aim of Big Local**

People are connected, people have choices and people are supported to achieve lasting change in the places where they live.

#### **Big Local outcomes**

1. Communities will be better able to identify local needs and take action in response to them.
2. People will have increased skills and confidence, so that they continue to identify and respond to needs in the future.
3. The community will make a difference to the needs it prioritises.
4. People will feel that their area is an even better place to live.

Source: Local Trust (2012) *Big Local Theory of change framework*, London: Local Trust, dated 19 September 2012.

It builds on the first annual learning review – *Early Learning from Big Local*<sup>1</sup> – and examines further the steps that are being taken towards achieving the overall aim and these outcomes. We have looked at four main questions to help us understand how residents and others in Big Local areas are starting to get involved, getting support, working towards a plan and beginning to influence change in the areas where they live. These are:

- a. What has happened so far in Big Local areas; what progress has been made along the Big Local pathway?
- b. Are people in Big Local areas gaining new skills and knowledge; how is this happening?
- c. Are people in Big Local areas building new relationships as part of building a Big Local partnership?
- d. Are people in Big Local areas identifying a goal and working out the steps to achieve it; what choices are they making?

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<sup>1</sup> Local Trust (2012) *Early learning from Big Local: An overview of evidence from the first 50 areas*, London: Local Trust which examined 'Progress on the pathway', 'Local involvement in Big Local', 'Support' and 'Bringing Residents into Big Local'.

## 1.1 Background and context for the annual learning review

Big Local areas have at least 10 years to make a lasting positive difference to their communities in 150 areas around England. These were announced in three waves of 50 areas from 2010, with wave three the most recent announcement in December 2012. Each Big Local area is allocated at least £1million and support over 15 years.

Local Trust makes it clear that this programme is '*NOT about your local authority, the government or a national organisation telling you what to do*'.<sup>2</sup> To ensure that residents are in control of Big Local in their areas, support from Local Trust has been designed to be light touch: '*on tap*' rather than '*on top*'.<sup>3</sup> Support mechanisms include: having a named individual, the Big Local 'rep', to work with areas as they develop Big Local; organising events and activities where people from local areas can share knowledge, learning and experiences with each other; specialist advice on social enterprise and investment. The programme also provides residents with a structure for developing Big Local locally. This is called the Big Local pathway and comprises several steps to enable residents to think about local need, local priorities, making sure residents from across the area can get involved and find ways to organise themselves.

This annual learning review builds on the findings of the first annual learning review<sup>4</sup> which covered the period July 2011 to March 2012. That review suggested that:

- Local context will affect the way Big Local unfolds in each area; while some areas had little by way of resources or local skills to draw upon, other areas were able to use local knowledge held by existing organisations and residents, and were supported by other local initiatives in their community.
- The Big Local pathway is not linear: areas moved along the pathway at different speeds, and move backwards and forwards, sometimes occupying two pathway stages simultaneously.<sup>5</sup>
- In some cases, progress was unsteady, affected by: '*challenging local relationships*', '*personal constraints*' and '*no-one taking responsibility... at steering group meetings*'.<sup>6</sup>
- Involving people took time, flexibility and imagination; there was sometimes a tension between the leadership that was necessary to progress along the pathway and the need to reach out to the wider community.
- Light touch support seemed to be working, but not all areas were taking up the chance to participate in events for sharing knowledge and experience.
- Opportunities relating to social enterprise and investment were being taken up to a degree, but issues relating to the local economy were not emerging as a priority.

These points from *Early Learning from Big Local* help us understand what to look for in this year's review: that context matters; that there is no single 'correct' way to move along the pathway; and that the character of interim steering groups, and the relationships they develop with Big Local reps and other local organisations, will affect local progress.

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<sup>2</sup> See <http://www.localtrust.org.uk/big-local/>

<sup>3</sup> We are quoting Tony Gibson who was the pioneer of Planning for Real and has provided many tools for participation in community planning over the years. [http://www.regen.net/Community\\_Renewal/article/1056403/neighbourhood-sage/](http://www.regen.net/Community_Renewal/article/1056403/neighbourhood-sage/)

<sup>4</sup> Local Trust (2012) *Early learning from Big Local: An overview of evidence from the first 50 areas*, London: Local Trust

<sup>5</sup> In fact the expectation is that Big Local areas will continue to move back and forth along the pathway throughout the fifteen year programme. 'Completing' the steps on the pathway (for example, submitting a plan) means that milestones prescribed by Local Trust have been achieved but areas are expected to need to get more people involved, to re-profile as areas change, and to submit new plans as they develop.

<sup>6</sup> See footnote 4.

## 1.2 What data did we use and what were its strengths and limitations

This annual learning review draws on the following data:

- Syntheses of data collected at networking and learning events
- Syntheses of data collected over four quarters from Big Local reps
- Quarterly reports (not synthesised) from Big Local reps 2011-12
- Reports to Local Trust from partners engaged in Big Local delivery
- Big Local delivery reports to Local Trust's board
- Analyses of '*Getting People Involved*' reports submitted to Local Trust.<sup>7</sup>

The data was analysed using Nvivo 10 software. Appendix One details the data that was available to us to answer the questions agreed with Local Trust.

To fully understand and keep abreast of what is happening in Big Local areas means capturing useful, meaningful data in ways that are appropriate to a programme of this kind. This is a challenge for any community development programme and is particularly so for Big Local with its 150 diverse communities, each with unique histories, resources and populations engaging in resident-led, and therefore different, practices. Data collected for this annual learning review period April 2012-March 2013 again demonstrates this, and so setting a baseline against which all data is measured has been a challenge. Moreover, data is collected by Local Trust and by several partner organisations each of which delivers a part of the programme. There is little consistency in the methods used to collect data and there are some significant gaps. Apart from Local Trust's own quarterly returns to Big Local, the most consistently collected data in 2012-13 were reports from Big Local reps that they are required to submit every quarter. In 2013-14 Local Trust will want to achieve similar levels of consistency in other data collected.

## 1.3 Structure of this review

This review is in three parts. Part One gives a broad overview of progress in Big Local areas. In Part Two we deepen our understanding of progress made towards the Big Local outcomes by focusing on three themes: knowledge, connections and influence. Finally, Part Three offers some conclusions and implications for Big Local.

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<sup>7</sup> These are analyses of Rounds One and Two of '*Getting Started*' and '*Getting People Involved*' carried out by the Community Development Foundation on behalf of Local Trust.

## Part One

### Progress through the Big Local pathway April 2012 to March 2013

Part One of this annual learning review describes progress in Big Local areas between April 2012 and March 2013. We begin (Section 2) with an overview of our findings about progress and emerging themes before presenting our analysis (Section 3) of the data from Local Trust and Big Local reps for each quarter of the 12 months from April 2012 and for each wave of Big Local areas. We do this by:

- Firstly, examining available data collected by Local Trust about Big Local areas' progress towards submitting proposals to Local Trust, and getting these proposals endorsed. This information is detailed in quarterly reports submitted to the board by Local Trust, with Q1 referring to April to June; Q2 July to September; Q3 October to December; and Q4 January to March.
- Secondly, analysing data collected from reps in their quarterly reports where they are asked to indicate how they see progress along the Big Local pathway in the areas in which they are working.

Where the data collected by Local Trust and the perspective offered by reps differs, we indicate this in the text below.

## 2. Overview of progress made April 2012 to March 2013

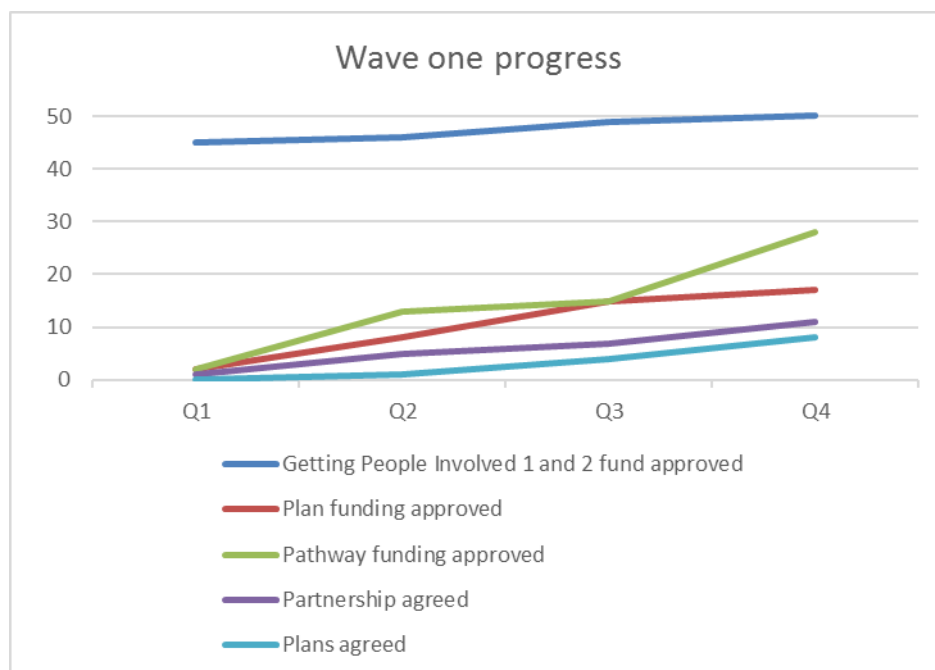
At the end of year one, the overall picture is one of progress, problem solving and continuous adjustment to the programme so that, locally, it remains resident-led. Below we summarise some key findings from our analysis of data collected from areas and from Big Local reps.

**Table 1: Overview of progress in waves one and two by quarter**

| <b>Wave one progress</b>                      | <b>Q1</b> | <b>Q2</b> | <b>Q3</b> | <b>Q4</b> |
|---|-----------|-----------|-----------|-----------|
| Getting People Involved 1 and 2 fund approved | 45        | 46        | 49        | 50        |
| Plan funding approved                         | 2         | 8         | 15        | 17        |
| Pathway funding approved                      | 2         | 13        | 15        | 28        |
| Partnership agreed                            | 1         | 5         | 7         | 11        |
| Plans agreed                                  | 0         | 1         | 4         | 8         |
| <b>Wave two progress</b>                      | <b>Q1</b> | <b>Q2</b> | <b>Q3</b> | <b>Q4</b> |
| Getting Started Fund approved                 | 0         | 14        | 24        | 41        |

Note: Table 1 is based on cumulative Local Trust data provided quarterly to the Local Trust board

**Table 2: Progress of wave one across the year and by first five stages of the pathway**



- We can see progress in areas that have been able to submit proposals to Local Trust for endorsement. Critical to their progress has been confidence: areas found it hard to tackle problems in the early days, but over time they have become more confident about taking decisions and tackling issues as they arise. We also noted during this year that areas needed confidence and some progress under their belts before they could fully take advantage of opportunities like the Big Local 'Spring events'. The same applies to opportunities to build on external events like the Golden Jubilee of Queen Elizabeth II.
- Each wave has distinctive characteristics to do with how and when it came about (administration of the programme, seasonal effects) that may have affected the way the programme has unfolded. We make a small number of observations below but suggest that in the future it may be more helpful to focus on other factors or 'variables' affecting progress:
  - Regardless of the order or combinations in which areas approach the Big Local pathway, 'vision' seems to be a prominent, early focus for their work.
  - Three external factors have been different for each wave: external events, seasonal effects and having a longer inception period for wave one than the subsequent two waves.
  - Wave one areas had nearly one year as an inception period between the announcement by Big Lottery Fund (BIG) and starting to work under Community Development Foundation (CDF) and with Big Local reps; waves two and three did not have this.
- Last year's report recognised that the pathway was not linear. This was even more evident this year. The way residents use the structure provided by the Big Local pathway continued to change, with interim steering groups working on several aspects of the pathway at once, moving back and forth along the pathway. In the latter part of the year, we also noticed that some wave one areas were using one pathway 'task' to help them achieve another, e.g. running an event about the local



vision during which they were also trying to recruit new members to the interim steering group.

- Early grant-making in the Big Local process such as '*Getting Started*' and/or '*Getting People Involved*' grants continued to be important in enabling areas to get going. The majority of wave one and two areas were accessing this funding within the first year under Local Trust. The number of wave one areas accessing pathway funding nearly doubled in the final quarter of the year. Only the applications for Plan Funding slowed down in the final quarter; the reason is unclear.
- In year one we can begin to detect some relationships between grants, progress and act effectively in developing partnerships. In all waves, areas had attracted support from elsewhere, including match funding and agreements with local authorities to return buildings to community use. We also began to see some tentative movement towards areas thinking about investment and finance as well as grants.<sup>8</sup> This is also explored in Part Two in relation to what areas are learning (Section 4) and the choices they are making (Section 6).
- Social investment has tended to move onto the radar of areas once they have become confident about their overall plan. Initially, where Big Local areas expressed their intention to engage with social investment, there appeared to be little understanding about what this might mean in practice. Over time, residents have begun to use the resources about social investment provided by Local Trust.
- Data collected from Local Trust and from reps differs in some respects. Specifically, reps tend to report that a step in the Big Local pathway has been reached when the local interim steering group or partnership is satisfied that this has been achieved. Local Trust's data reflects when Local Trust has been made aware of this and, where relevant (e.g. Big Local plan), has been received and endorsed. As a result, it appears that progress reported by reps will appear in the subsequent quarter in Local Trust's own progress reports.

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<sup>8</sup> Now, in 2013-14 we are seeing a stronger connection between grant-making and investment in Big Local areas.

### 3. Progress in Big Local areas: by quarter and by wave

#### 3.1 Quarter 1: April to June 2012

At this time there were 100 Big Local areas. **Wave one** was announced by BIG in July 2010. Fifty **wave two** Big Local areas were announced on 29th February 2012.

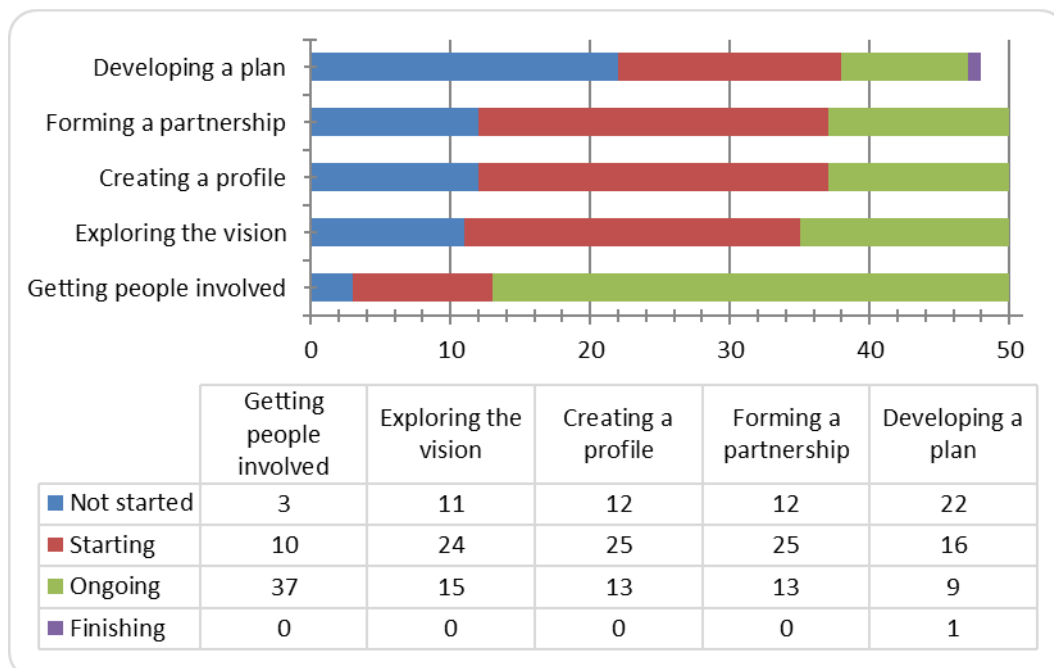
**Wave one** areas had been given access to 'Getting People Involved' money. Initially this was administered by BIG and CDF before Local Trust became established in April 2012 as the organisation to deliver Big Local. By June 2012, 45 of 50 proposal forms for this money had been received and endorsed, and some **wave one** areas had completed these activities. Two **wave one** areas had also accessed a further £2000, available to support further development of their Big Local plan. Local Trust had received two pathway proposals by June 2012. One Big Local area had been endorsed as a partnership.

**Wave two** areas also had access to funding. 'Getting People involved' funding had been renamed 'Getting Started' funding to ensure that getting people involved was seen as a constant process rather than a one-off step. As the 'Getting Started' funding only became available in May 2012, by the time of this Q1 report in June, Local Trust had not received proposals.

#### How did waves one and two experience the pathway in Q1 according to reps?

Rep data taken from their quarterly report for April to June 2012 described what was happening in those **wave one** areas that had not submitted proposals to Local Trust. Table 3 below suggests that there was lots of ongoing getting people involved activity in this quarter, and that some of the later pathway stages, such as forming a partnership or creating a profile, were being tentatively explored.

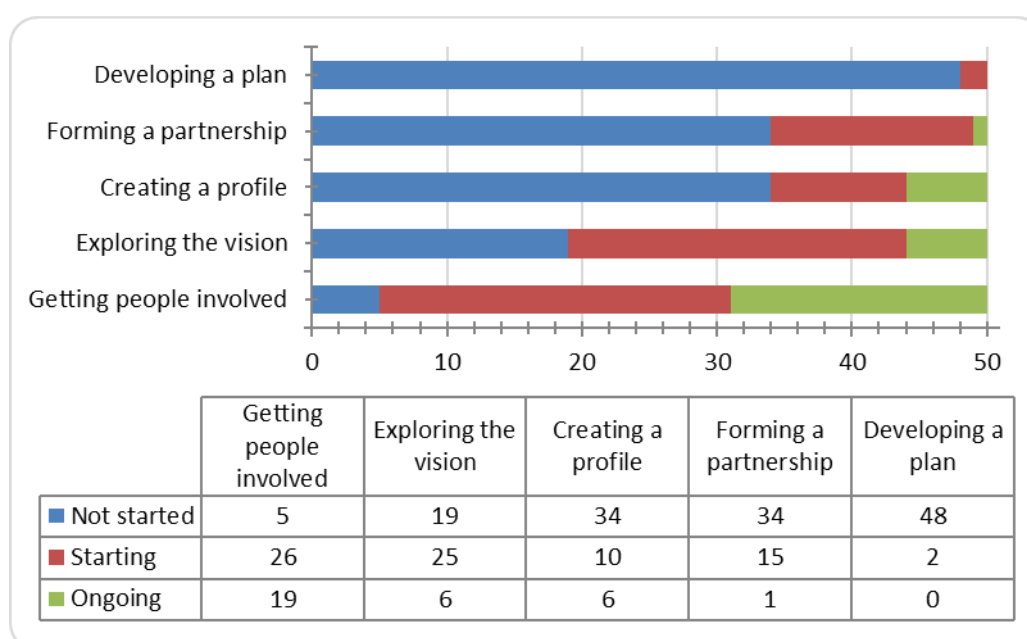
**Table 3: Wave one as seen by reps between April to June 2012**



Reps describe a wide variety of local activities from events and meetings to awarding small grants. This suggests that while they are getting people involved and exploring a community vision, interim steering groups are also exploring the development of partnerships and profiles. They report that: '*... things are starting to happen ... and the group is keen to develop a partnership*' and that: '*amongst other issues [the interim steering group] have monitored the progress of the community profile*'. As the pathway is iterative, Big Local areas '*continued to involve residents and promote participation*' and were '*reaching out to other agencies and organisations*' at the same time.

Table 4 suggests that a number of **wave two** areas had not yet got started, but that those that had were beginning all stages of the pathway; getting people involved and exploring a community vision were again the most active stages.

**Table 4: Wave two as seen by reps between April to June 2012**



At this time no **wave two** areas had submitted proposals to Local Trust for '*Getting Started*' funding. Their activity involved arranging events to promote Big Local, deciding on locally trusted organisations and agreeing how the '*Getting Started*' funding would be spent. Reps reported, for example: '*Agreement around employing a development worker with 'Getting Started' funding and working group established to develop this*'.

### 3.2 Quarter 2: July to September 2012

**Wave one** areas during this period moved closer to completing their activities for '*Getting People Involved*' funding. Local Trust received two further proposals, endorsing one, taking the total to 46 approvals. Some areas asked to change the scope of their initial proposal, usually where they wanted to use some underspent funds on something else. In one example, a Big Local area underspent because they were able to raise in-kind and match funding as in the example below:

**Box 2: Example of a Big Local area receiving match funding**

In October 2011 the Ewanrigg Big Local area put in a proposal for 'Getting People Involved' 1 and 2 (£29,510) for the period of November 2011 to June 2012. In July 2012 Local Trust was contacted by the locally trusted organisation to say that the Big Local area had completed all their planned activities, including a lantern parade, youth consultation and events, training for young people to do research, and a community newsletter. But that they had spent just £7,710 of their total budget. This was because the group had received more in-kind support and match funding than expected. This had come from both local voluntary organisations as well as the public sector. (*Big Local delivery report, March 2013*)

Local Trust also received a further eight proposals for the £2000 Big Local plan funding, taking the total to nine, with eight endorsed. Proposals included further consultation with residents, filming residents talking about plans for their Big Local area, as well as reproduction costs.

Local Trust also made available grants of £18,000 called pathway funding (out of an area's £1million) to help **wave one** areas with developing their plan if they had not managed to reach this stage using their initial Big Local funding. Of the 13 proposals received for this funding, grants were made to cover the costs of support from community workers, to run events and to undertake participatory budgeting exercises.

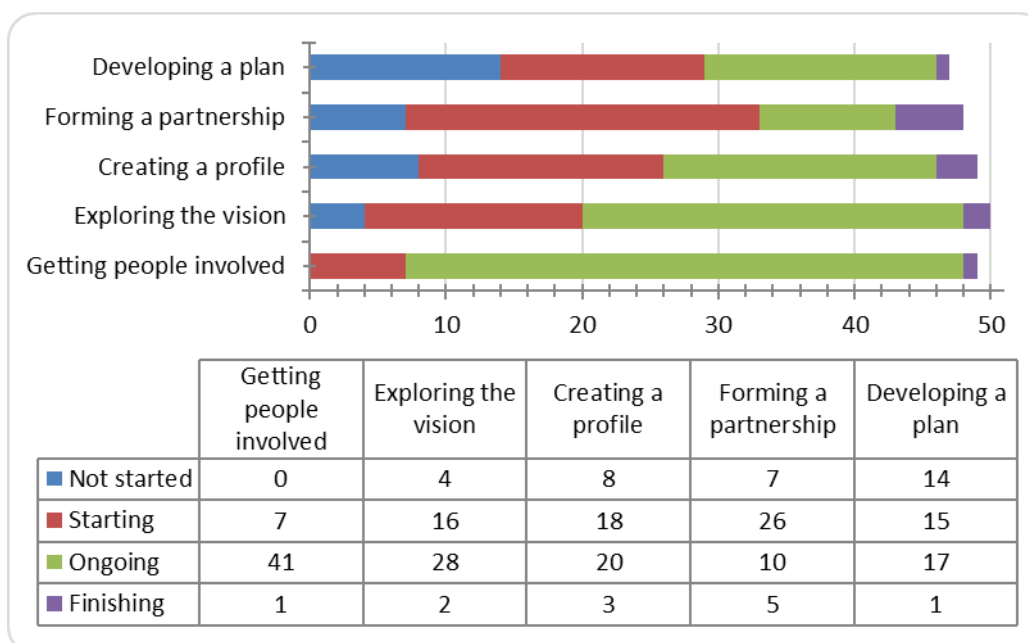
A further five **wave one** areas sent Local Trust their memorandum of understanding and forms to endorse their partnerships, making six in total with five endorsed by September 2012.

Between July and September, 17 'Getting Started' proposals had been received from **wave two** areas. Of these 14 had been approved.

***How did waves one and two experience the pathway in Q2 according to reps?***

Reps considered that all **wave one** areas had started the process of getting people involved, and many had made strides in what they had accomplished, reflected in the data which indicates that 41 areas were considered to be 'ongoing' in their 'getting people involved' activity. Table 5 below details **wave one** areas generally progressing from 'starting' to 'ongoing' status which reflects Local Trust data on receiving proposals in this quarter.

**Table 5: Wave one as seen by reps between July to September 2012**



### *Using events to get more people involved*

In terms of activity **wave one** areas were reported to have taken advantage of national events that ran throughout this period: the Golden Jubilee of Queen Elizabeth II and the 2012 Olympic and Paralympic Games. Strategies included several Big Local areas using a 'Big Local bus' a 'lantern parade' and an 'art trail to raise the [Big Local] profile'; one Big Local area used a 'beating the boundary parade' which 'literally made a noise about Big Local to bring residents out of their homes'. The rationale for this was: 'about marking out the Big Local territory - it's not a natural community so [this] brings together three areas'. A number of Big Local areas also produced films to help promote Big Local in their area.

### *Developing local relationships*

As well as getting residents involved, **wave one** interim steering groups continued to develop relationships with organisations, including local authorities, housing associations, local charities, credit unions and other community development/regeneration initiatives operating in their areas as well as starting to connect with local shops and businesses.

### *Support from the centre*

Interim steering groups also began thinking about the local economy and the involvement of UnLtd and Small Change, with reps reporting that residents were beginning to talk about participatory budgeting, 'plugging the leaks'<sup>9</sup> and loans as well as using the Big Local podcasts about social investment produced by Small Change.<sup>10</sup>

<sup>9</sup> <http://www.pluggingtheleaks.org/about/index.htm>. This is an online guide developed by the New Economics Foundation to highlight ways of spending money in organisations with local presence, rather than national corporations. It offers tools to help organisations understand their local economic impact in social terms, i.e. where did the money go and what effect would staying local have.

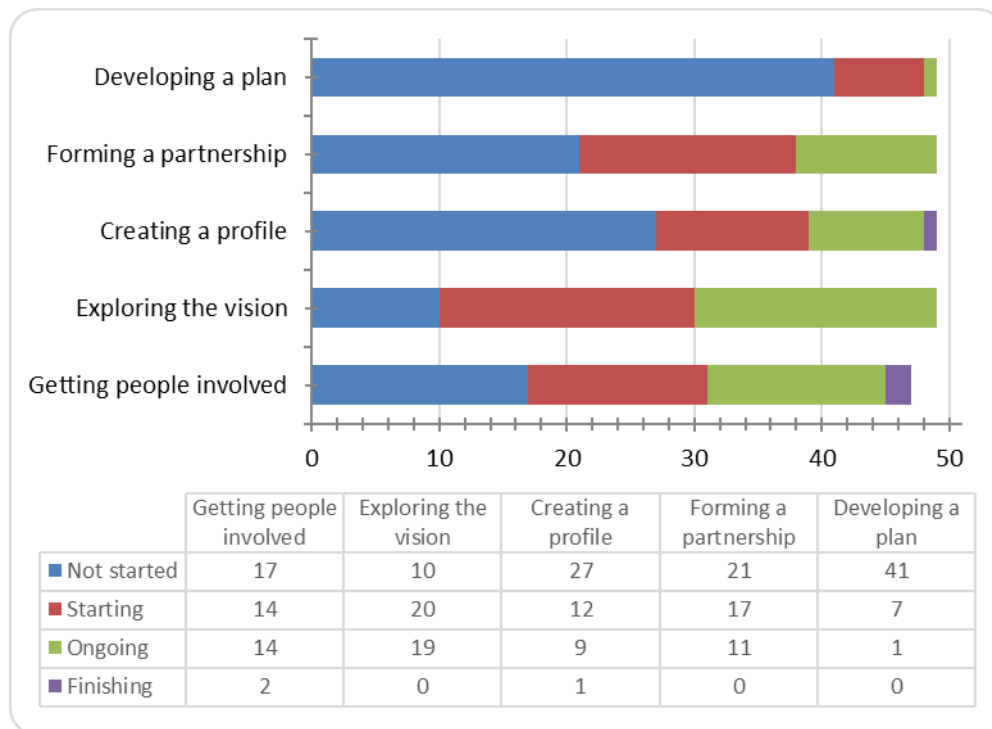
<sup>10</sup> [www.localtrust.org.uk/big-local/social-investment/](http://www.localtrust.org.uk/big-local/social-investment/)

*Learning from other Big Local areas*

Reps noted that residents were becoming more interested in networking with other Big Local areas. Visiting another Big Local area or attending an event were both thought by reps to be a good route to fostering strong connections between areas: *'Contacts generated from Big Local visits and events seem to grow stronger than when we try to foster a relationship between some areas that we've never met'*. Reps reported that online videos produced by other Big Local areas were also inspiring. During this quarter, reps also noted the value of the 'Spring events', with residents who attended presenting their findings or producing a report for the interim steering group. The most frequently mentioned benefits were an increase in confidence and sharing ideas.

Table 6 below highlights how **wave two** areas also began in earnest to develop their interim steering groups and explore their vision alongside getting people involved.

**Table 6: Wave two as seen by reps between July to September 2012**



An increasing number of **wave two** areas, six months in, explored all stages of the pathway, which is reflected in the 14 submissions received for 'Getting Started' funding. However a few areas started more slowly. Reps suggest this was because of long standing local issues such as *'sectarianism between agencies'* slowing progress at meetings, as well as *'residents [seeing] their area as a few roads'*. Reps commented that the 'Spring events' may have come *'too early'* for the second wave of Big Local areas and also thought that these areas had not made enough progress (as compared with **wave one** areas) to take full advantage of the opportunities presented by the 2012 Olympic Games and Queen's Golden Jubilee celebrations. However, despite being described by reps as 'not yet started' in all categories, reps also recorded that residents and agencies were holding meetings; reps continued to promote Big Local; and one **wave two** area received a visit from the UnLtd award manager.

### 3.3 Quarter 3: October to December 2013

During the period October to December Local Trust received a further two ‘*Getting People Involved*’ applications from **wave one** areas, making 49 approved in total. Four **wave one** areas had completed their activities for ‘*Getting People Involved*’ funding. A number of areas requested changes and extensions; in their *Big Local delivery report* to the board, Local Trust relates this to Big Local areas having the confidence to review their activities and make changes.

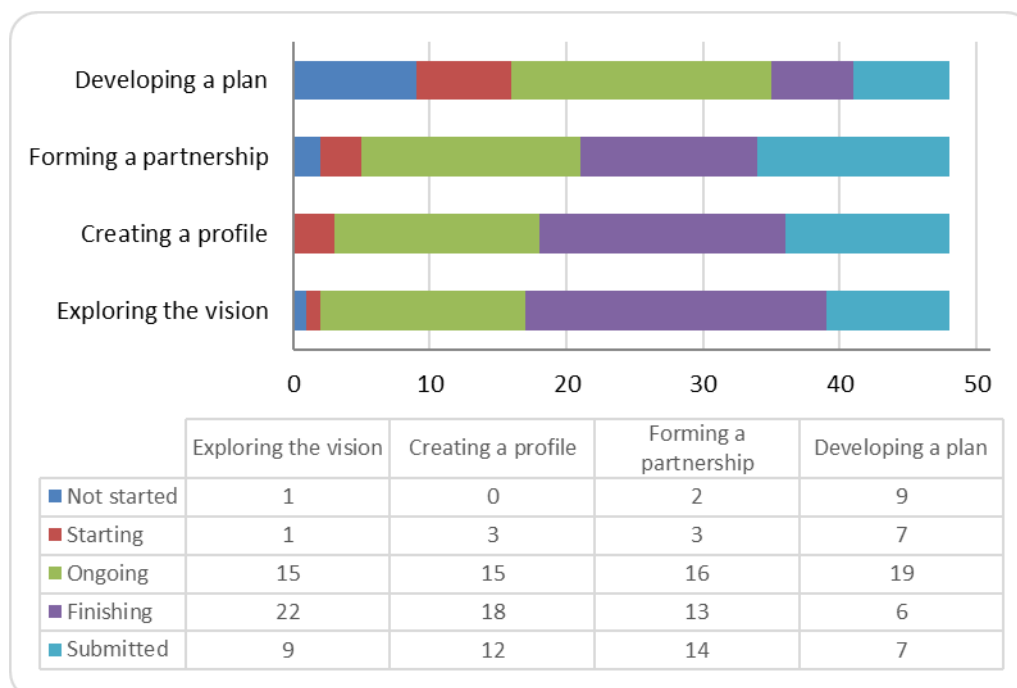
A further eight **wave one** areas submitted proposal forms for the £2000 pathway funding to help create a Big Local plan, taking the total to 17 submitted with 15 endorsed. A further four **wave one** areas also requested the £18,000 pathway funding, with 15 of the 17 endorsed. Local Trust endorsed two more partnerships, with another being assessed. Local Trust received four plans, with three endorsed.

**Wave two** areas continued to apply for ‘*Getting Started*’ funding. By September Local Trust had received 29 proposals, with 24 approved. In addition to this, 14 **wave two** areas had levered in £123,286 of additional funding.

#### *How did waves one and two experience the pathway in Q3 according to reps?*

**Wave one** areas continued to work across the pathway, with most areas being recognised as ongoing or finishing stages. Reps report some **wave one** areas had ‘submitted’ when they had not; this may be where reps felt the proposal was ready to be sent but had not been by the time of report: in three areas that had not actually submitted proposals reps reported that ‘*plan is ready*’ and ‘*plan signed off by partnership*’ and these were endorsed during the next quarter. The same may be said for endorsement of partnerships, where reps felt a further eight were ready to submit and a further five were endorsed during quarter four.

**Table 7: Wave one as seen by reps between October to December 2012**



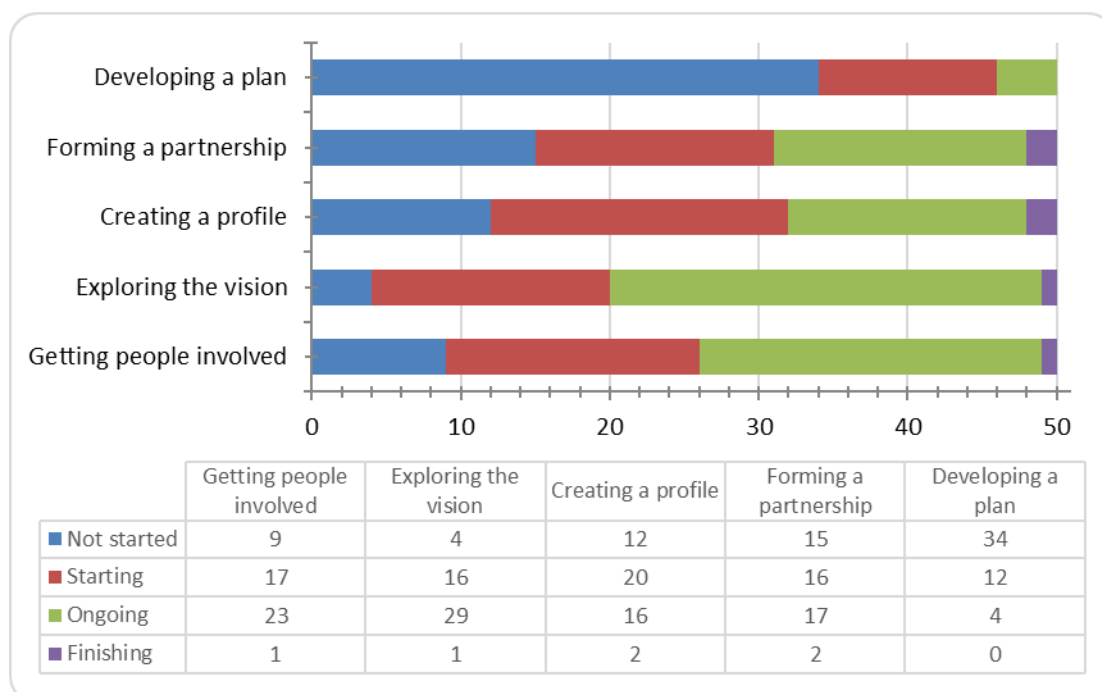
In this last quarter of 2012, **wave one** interim steering groups were described as *'more confident and established'*. This translated into: many of them developing subgroups to focus on the *'capacity and skills for the challenges ahead'* for members of the interim steering groups; some transferring from a *'professional heavy steering group to a resident-led partnership'*; and a few, reappraising their Terms of Reference.

**Wave one** areas continued to develop relationships with potential partners, including universities, schools and businesses such as local supermarkets. The existing relationships had deepened, with one Big Local area looking to take ownership of a council property. Social investment and the local economy had been discussed by a small number of interim steering groups but reps felt residents needed more information and examples. One area for instance had allocated £150,000 of its total budget for this without being able to specify how this money might be used: in the quarter 3 report reps state support is needed to translate the *'rhetoric [of social investment] into everyday language and practice'* to *'get it started'* which can address *'the thorny matter of investment of capital'*.

**Wave one** areas continued to get people involved through events but the emphasis of the events was slightly different. Rather than using events to raise awareness, **wave one** areas had been undertaking *'consultation events'* and *'visioning events'* which had attracted residents who might join interim steering groups as well as contribute to the Big Local vision and plans. **Wave one** areas also used their funding for quick wins in the community, including replacing blackout curtains in a school, enhancing community green spaces and funding projects through community chest grants.

**Wave two** areas were reported to be mainly ongoing with areas previously reported as 'not yet started' having now 'started'. Table 8 below highlights how reps perceived progress.

**Table 8: Wave two as seen by reps between October and December 2012**



Reps report activities for which the *'Getting Started'* money was to be used, including reproduction of postcards, posters and leaflets, the creation of websites, and community events, including Christmas parties and a *'Big Local supper'* all to get the local conversation about Big Local started.



Reps suggested that the winter months saw slower progress overall than the summer months and that residents had therefore focused on developing their partnerships: *'The winter months have slowed public facing progress'*. Interim steering groups also appeared to be going through a *'settling'* phase to *'decide priorities'*. In some cases this was between residents, and in another between residents and organisations. In several areas the discussions were over the identity and remit of the locally trusted organisation.

In one area that had not yet got started on the Big Local pathway, the rep was changed. The new rep identified a: *'mistrust of some activists [because of a previous] development trust that ultimately failed'* as a reason for slow progress. Residents later overcame this challenge and completed their *'Getting Started'* application, working closely with the locally trusted organisation.

### 3.4 Quarter 4: January to March 2013

In this quarter there were 150 Big local areas as 50 **wave three** areas were announced on 10<sup>th</sup> December 2012.

By now, *'Getting People Involved'* proposals had been received from all 50 **wave one** areas, committing over £1million to these areas. Local Trust explained in their *Big Local delivery report, March 2013* that much of this money was spent on marketing, promotion, events and staff costs. **Wave one** areas submitted 14 end of funding reports, 22 requests for extensions and 14 budget amendment requests during 2012-13. These requests to change budgets and plans were perceived by Local Trust as positive because:

*'This ... indicates that residents and locally trusted organisations are learning from their activities and modifying them to what is most appropriate for their Big Local areas.'* (*Big Local delivery report, March 2013*)

**Wave one** areas continued to submit proposals to Local Trust. This included seven further pathway funding proposals, five partnership proposals and four plan proposals. In total Local Trust received 13 partnership proposals and eight plan proposals in 2012-13.

**Wave two** areas also continued to send proposals for *'Getting Started'* funding, with 40 areas submitting proposals (80 per cent). Half of these said they had sourced additional funding, with £134,557<sup>11</sup> promised in total. The first **wave two** areas to submit a proposal for pathway funding also came in this quarter.

**Wave three** areas were not entitled to apply for their *'Getting Started'* funding in this quarter. As with **wave two**, Local Trust encouraged residents to spend the first three months forming themselves into a group and identifying a locally trusted organisation, which could then apply for funding.

#### **How did waves one and two experience the pathway in Q4 according to reps?**

**Wave one** areas continued to progress according to reps. Table 9 below highlights the development of **wave one** areas. The numbers 'completed' do not tally with the numbers of proposals received by Local Trust; for example reps indicated that nearly twice the number of plans and partnerships were submitted than had been received by Local Trust. An analysis of these areas reaffirms our findings for quarter three: that reps consider areas to

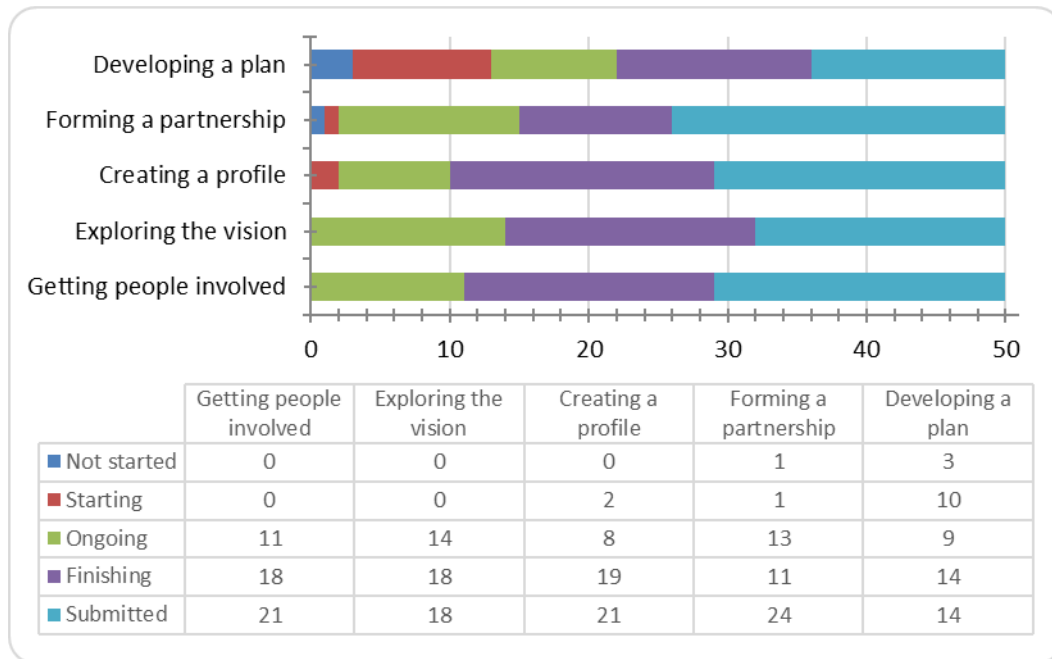
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<sup>11</sup> *Big Local delivery report, March 2013.*

have 'completed' when the interim steering group has endorsed the proposal, rather than when it has been received and endorsed by Local Trust.

Many areas have continued to get people involved through developing sub-groups, increasing the diversity of the interim steering group or partnership, and through 'quick wins' with one area having granted nearly £5000 in £500 grants. Reps have also reported that interim steering groups seem to have more confidence to take decisions, with plans to replace locally trusted organisations, the removal of difficult members and further training arranged for members.

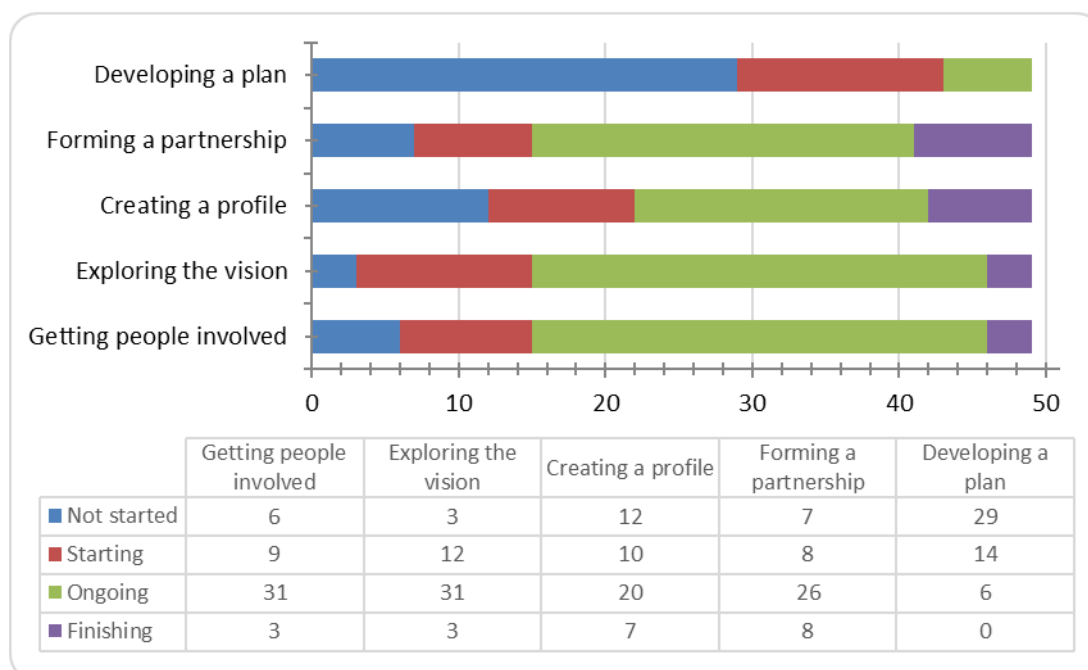
**Table 9: Wave one as seen between January and March 2013**



**Wave one** areas that have submitted Big Local plans also appeared to have begun talking about social investment; several **wave one** areas met with Small Change to discuss options. These areas also began to meet with local credit unions to discuss working together.

**Wave two** areas continued to work across the pathway, using the 'Getting Started' funding, for which 40 areas had submitted proposals to Local Trust.

**Table 10: Wave two as seen by reps between January and March 2013**



Activities included funds for quick wins, called ‘*Chatterbox funds*’ or ‘*community chest*’ funds, events to promote community engagement in developing a local vision, and working with local organisations on ‘green’ projects, including allotment projects and park projects, and planning events, several of which included ideas to redevelop shopping areas.

Interim steering groups were reported to have begun to develop some subgroups as the process of developing Big Local for **wave two** areas. These subgroups were overseeing communication, the community chest funds and some were contributing to aspects of the Big Local plan such as elderly people, local economy and young people.

Some areas had a community worker in place, and some reps believed that progress improved with this. Other areas secured support from their local council (e.g. help with community research), and from their locally trusted organisation (e.g. holding the contract for a community worker).

Reps reported that **wave three** areas held meetings with residents as well as local organisations, religious groups and private businesses. Residents who are engaged at this early stage have also been meeting in a variety of places, including cafés, the town hall and the local pub, using videos and websites from waves one and two to engage residents with the idea. Reps also commented that there was a great deal of positive activity by residents to promote Big Local, including taking the project to their local MP, councillors and local NHS executives.

## Part Two

### Progress towards the Big Local outcomes: thematic analysis

Part One of this review used the Big Local pathway to assess broadly the progress that has been made across the different waves. In this second part of this review we focus on three themes, which were identified in the theory of change as being especially important to the early development of the programme locally and nationally. They are: knowledge, connections and making choices.

#### 4. Knowledge

A number of assumptions underpin the way Big Local has been set up and the kinds of support that have been made available to Big Local areas. One of these assumptions is that building local skills and knowledge is essential to achieving Big Local's overall aim. In order to explore this theme we analysed the available data against two questions (see below). We have only looked at the support offered by Big Local and therefore our analysis of what residents are learning is also limited to what they are learning via Big Local support. Future research and analysis could take a broader look at the range of support residents are accessing and what they are gaining from it. The remainder of this section is structured around our two questions:

- What kinds of Big Local support (learning events, reps, award managers) are residents and others using and finding helpful?
- What evidence is there that residents are acquiring knowledge and skills through Big Local support?

The section ends with some reflections on early evidence of Big Local areas becoming strategic about the way they go about acquiring the skills and knowledge they need.

##### 4.1 What kinds of Big Local support are residents using and finding helpful?

There are currently two main ways in which Big Local aims to build skills and knowledge locally: events and direct support. These are delivered by Local Trust and partners, including Living Space Project (formerly Capacity Global), Small Change, UnLtd and the National Association of Neighbourhood Management (NANM), as well as Big Local reps working across the 150 Big Local areas. Big Local areas also get support from individuals, groups and organisations in their area, including the local trusted organisation.

###### 4.1.1 Events

In this section we discuss examples of three kinds of events that have been held between 2012 to 2013. We selected these for two reasons: first, we have data of a reasonable quality about these events; second, they allow us to explore three drivers for events – Local Trust initiated events, a resident-initiated event and partner initiated events (which tend to be issue based). The first two were facilitated by NANM, the third by the relevant partner.

- **Local Trust initiated events: the Big Local 'Spring events', 2012**

The main events initiated by Local Trust over the period of this review were the twelve 'Spring events' held around May 2012 and jointly organised by Local Trust with NANM.

These gave areas the opportunity to find out more about Big Local, and were designed to build: *'people's awareness of the different aspects of the programme, of what is happening in other areas and current thinking from the programme'*.<sup>12</sup>

The events were popular. 57 per cent of attendees were residents, with the remainder Local Trust's partners and other organisations, including British Waterways, Centre for Social Impact and Conservation Volunteers, as well as Big Lottery Fund, partner organisations and Local Trust trustees. A total of 203 residents from across 79 Big Local areas attended.<sup>13</sup> Fifteen wave one areas and eleven wave two areas did not attend – all these wave one areas had contact with the Local Trust team about this, but only one of the wave two areas.

The 'Spring events' were popular with residents for a variety of reasons.<sup>14</sup> They provided an opportunity to meet the Local Trust staff team:

*'There was lots of listening, asking questions, people asking for clarification on Local Trust's guidance and how that might play out in their local contexts.'* (NANM report)

They also gave participants the chance to learn about specific themes, such as social enterprise and investment. Particularly valuable for residents was the mix between formal learning and the opportunity for informal networking with people from other Big Local areas. Indeed, in event feedback forms, *'networking, sharing ideas and meeting residents'* were said to be the most useful aspects of the events. Talking with other residents informally allowed participants to: *'match their own progress against that of other areas, understanding how others were approaching problems'* (Big Local resident) – for example, wave two residents found them a useful opportunity to learn from wave one areas. Residents told Local Trust and NANM staff that they would take away from the events new contacts, ideas about specific actions, and renewed confidence:

*[Residents] specifically mentioned being reassured about their area's progress or that they were leaving more confident as a result of the day.'* (Big Local partner)

- **A resident-initiated event: 'Partnership Matters'**

'Partnership Matters'<sup>15</sup> came about when one resident contacted NANM with the idea of holding an event for those areas that had reached the stage of putting a partnership in place, so that they could share experience. NANM spoke to Big Local partnerships over the telephone to plan the event, manage expectations and gauge attendance. Those attending determined the agenda.

Eight people from five Big Local partnerships attended the event with apologies from one further area that had planned to attend. In the morning, the group discussed how each area had arrived at their particular partnership structure, then in the afternoon they focussed on the issues that might need addressing in the future of the partnership, and how to do this. Local Trust staff also attended the event and joined in with the conversations.

The event came up with a series of learning points, which are reproduced in the box below.

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<sup>12</sup> NANM Synthesis report, 2012.

<sup>13</sup> Report to the Board, September 2012. There were only 100 areas in Spring 2012.

<sup>14</sup> This evidence is taken from NANM's report on the events, which in turn is based on 180 feedback forms, partner observations, session notes and vox pops collected at the events.

<sup>15</sup> 'Partnership Matters', 30<sup>th</sup> November 2012, NCVO, London.

**Box 3: Learning from ‘Partnership Matters’, 30<sup>th</sup> November 2012, NCVO, London, extract taken from ‘Partnership Matters’ Learning Paper, NANM.**

- Your partnership doesn’t have to be a legal entity, and very few Big Local areas are going down this route
- Set out what success will look like in your Vision, keep reviewing it and be ready to explain why so that you can measure and evidence any change
- Look 11 or more years ahead and work backwards so that you ensure what you do is sustainable
- Maximise your assets; don’t build a new build if you can refurbish an existing space
- Think small AND big, short- AND long-term wins
- In terms of what percentage should be spent on grants and loans, there is no guidance as such but, as an example, if 20% of a loan is recycled over three years it will amount to 60%. Try it, see what works and be flexible
- Monies recycled through loans and social investment will not go back to BIG or the Big Local Trust but it will be decided by the partnership/Local Trust how the funds will be used going forward, to the benefit of the area
- Most credit unions are small so, if you are thinking of setting one up, you will probably only need around £30,000 to do so for your area. It can also take about two years to set up a new credit union: Money Advice Trust is useful for free advice.

On reflection, a NANM staff member agreed that ‘Partnership Matters’ was: *‘an event that enabled the first wave of chairs to learn from, and with, each other’*, but quite apart from the benefits to those involved, a significant outcome of this meeting is that it led to the re-development of NANM’s ‘learning sets’: *‘our understanding of the need for the [learning sets], and initial thinking about the sort of topics that it might explore, were influenced by the November meeting’*.

- **Partner-initiated events: Living Space Project workshops**

Partners contributed to the Big Local ‘Spring events’, but Living Space Project (formerly Capacity Global) has also run three themed workshops with Big Local residents, looking at *‘people and place’*, *‘hard to reach groups’*, and *‘diversity’*<sup>16</sup>, producing a learning paper on each. The workshops were discussion-based, with time spent *‘hearing participants’ stories and experiences’*. Residents completed feedback forms, which were collected into appendices at the end of the papers, in which sharing experiences and ideas and the opportunity to network were again described as the most useful aspect of the workshops. As well as the benefits for participants, the events have produced useful learning for the programme as a whole, particularly in relation to ‘hard to reach groups’. We return to this in later sections.

#### **4.1.2 Direct support**

In 2012-13, as with the previous year, Big Local areas received direct support from the reps and partners. Support from other residents in their own or another Big Local area seems to have become more prominent. These three sources of support are explored under this heading. We discuss the support areas receive from local organisations separately.

- **Direct support from reps**

The Big Local reps’ role is to act as a facilitator, offering support and guidance to areas as they move along the pathway. Reps do this through: *‘Big Local programme advice’*, *‘Using community development skills’*, *‘Using experience and networks’* and *‘facilitation and*

<sup>16</sup> *People and Place Workshop, 12<sup>th</sup> September 2012, Northfleet, Kent; Hard to Reach Workshop, 30<sup>th</sup> November 2012, London; Involvement and Diversity Workshop, 9<sup>th</sup> March 2013, Leeds.*

*training*.<sup>17</sup> Examples of *'community development skills'* included informal conversations with steering groups on maintaining enthusiasm and helping them to understand that *'engagement is different from consultation'*, whilst, more formally, Big Local reps have brokered relationships with local stakeholders and levered in additional support to help develop skills, knowledge and training.

Data collected from Big Local reps indicates that they have facilitated decision-making: for example, whether to seek outside help with particular tasks; who local groups might work with locally; and how and whether to recruit staff. They have also provided an important source of support for partnership development: one described her role in helping *'develop terms of reference for the partnership'*; others stressed the importance of *'developing trust between partners'*, *'managing expectations'*, and *'facilitating communication ... for example, between residents and councillors'*.<sup>18</sup> The Renaisi report also highlights their roles as informal mediators *'to help partners understand each other's positions'* or in challenging the way the partnership is developing – one reported on the need to:

*'... challenge the exclusivity and effectiveness of the Steering Group as a decision-making body ... by asking questions.'*

In their quarterly reports, Big Local reps explained that Big Local areas particularly value the opportunity to use them as a sounding board to support reflection on process and practice. However, this was not always the case – one rep reported for example that their Big Local group members: *'refuse to believe that my constructive criticism is anything other than negatively critical'*.

In their End of Assignment reports, Big Local reps were able to step back. They suggest that areas are *'slowly developing in confidence'* – as one said:

*'I'm now trying to ensure that members of the planning group go to external meetings – either on their own or with me initially, and also am beginning to try and get them to facilitate their own planning meetings.'*

- **Practical support from partners**

Big Local areas also access direct support from national partners who bring particular expertise in relation to social enterprise and investment, 'green' issues and diversity. In the box below we summarise the levels and types of support offered in relation to social enterprise and social investment in 2012.

**Box 4: Support for social enterprise and investment in 2012<sup>19</sup>**

- 200 awards were made by UnLtd to people who *'have the potential to become community entrepreneurs'*, with 95% of these awards below £5000
- 11 star partners were helping UnLtd deliver the Star People programme
- Small Change responded to 26 queries on social investment and 100 Big Local areas had received the social investment toolkit and guide
- Small Change recorded 10 podcasts, posted 5 blogs, tweeted 181 times and garnered 181 followers
- Both UnLtd and Small Change took part in local events across the year to promote social investment and enterprise.

<sup>17</sup> Renaisi report on Big Local reps' activities between September and December 2012.

<sup>18</sup> Big Local Quarterly reports and CDF *Getting People Involved Round 2 report*.

<sup>19</sup> Data from UnLtd Summary of Progress for 2012 and Small Change Q3 report.

Star People Awards<sup>20</sup> clearly have the potential to enhance local skills. Star people: *'are individuals with ideas that can improve their area, both big and small, that they are willing to lead, [supported through] a tailored package of funding and support to help their ideas become a reality'*.<sup>21</sup> The awards are tiered to suit experience, and called 'Try it', 'Do it' and 'Build it'. In one case, an award to a resident who provided sports coaching has led to interest from resident participants in training to become coaches themselves in the future, whilst in another area a resident has used a £15,000 grant to develop community laundry services and has begun discussions with the local enterprise partnership about a further £50,000 investment. It will be interesting to see how other awards benefit their wider communities as the programme develops.

Small Change also produced a series of social investment learning tools for residents including:

*'... a series of guides to social investment, ... a loan calculator, and a 'social investment oracle', ... a series of podcasts and ... a wave 1 matchmaker ... to identify credit unions and Community Development Finance Institutions (CDFIs) that are interested in working in [local] areas.'* (Big Local partner)

The organisation uses a twitter account to spread its tools and information about social investment as widely as possible among Big Local areas, partners, CDFIs and credit unions. This has proved popular, with Small Change reporting in their quarterly report for September–December 2012 that: *'181 tweets covering issues including entrepreneurship in Big Local areas, local investing, social entrepreneurship, payment by results and social impact measurement'*.<sup>22</sup>

- **Peer support**

Big Local areas have also supported each other. In 2012-13 at least 32 Big Local areas were said (by reps) to have visited another Big Local area. This could be a visit by a group or by one member of the interim steering group, who would report back.

Visits were often arranged to learn about specific topics, such as participatory budgeting, but they sometimes led to longer term 'twinning' or 'buddying' relationships. Sharing experience in this way could increase confidence: one area, for example, *'felt more confident after the visit because they realised that they are doing some things really well and have things to offer other groups'*. However, buddying is not the answer for all Big Local areas. One Big Local rep reported that it had been: *'very difficult to find an area willing to 'buddy' with' their area and that areas nominated by NANM had replied that 'they were too busy'*.

#### **4.1.3 Support from local organisations**

Big Local areas also looked to local organisations for support and reps say that these organisations have been offering a wide variety of in-kind support, including:

- Carrying out an audit of community activities in or available to the Big Local area
- Involving residents in *'door-knocking to get people's ideas'*
- Providing facilities, such as office or meeting space
- Acting as the formal employer of a development worker
- Offering mentoring and training to the interim steering group
- Raising awareness of Big Local in the wider area.

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<sup>20</sup> <http://www.localtrust.org.uk/big-local/star-people/>

<sup>21</sup> <http://www.localtrust.org.uk/big-local/star-people/>

<sup>22</sup> UnLtd also offer direct support but there is limited data beyond the numbers of awards regarding their engagement in Big Local areas.



This support may come from one organisation or from several. Gaining access to this kind of support is vital, as one rep stated: *'An early connection with an established voluntary sector community support organisation helped give direction and open doors, including with a prickly politician'*.

Particularly important in this respect is the locally trusted organisation. Whilst more needs to be known about the relationships between Big Local areas and their locally trusted organisation, CDF's *'Getting People Involved' Round 2* report provides some data on the type of locally trusted organisation appointed for wave one areas (Table 11 below) and, in the Box below, on the reasons why they were chosen.

**Table 11: Locally trusted organisations by organisational type for wave one**

| Types of locally trusted organisations                         | Number of areas |
|--|-----------------|
| Other local charity (not CVS)                                  | 22              |
| Councils for Voluntary Sector                                  | 14              |
| Housing association/Arms-length management organisation (ALMO) | 7               |
| Local Authority (council)                                      | 3               |
| Other local non-charitable organisation (e.g. private sector)  | 3               |
| Other local public sector organisation (e.g. school)           | 1               |
| <b>Total</b>   | <b>50</b>       |

*Source: Local Trust management information. Categories assigned, not provided by areas.*

**Box 5: Reasons why locally trusted organisations were chosen**

- a strong local knowledge and community involvement (18 areas)
- they had been the lead organisations in GPI funding round one (13 areas)
- a strong partnership network (ten areas)
- being familiar to those selecting the locally trusted organisations (eight areas)
- ability to reliably manage finances (eight areas)
- they had contributed to round 1 (three areas).

*Adapted from CDF, Getting People Involved Round 2 (GPI R2) report*

This data suggests that most locally trusted organisations for *'Getting People Involved' Round 2* are local charities (including housing associations). As their name suggests, they do tend to be organisations that are rooted locally, trusted but also familiar.

From the limited data we have, it appears that the relationship can work well, but some concerns about accountability and workload have been voiced by reps in their quarterly reports. Thus, a rep reported: *'volunteers from the locally trusted organisation took on more than they could chew ... everything went silent'*, leading to a slowing of progress. In another case, the locally trusted organisation and the Big Local interim steering group have: *'agreed the work plan and budget for the locally trusted organisation and the staff work three days per week on the project'*. This has led to a great deal of activity but the rep is: *'working closely with the chair and vice chair to make sure they are able to hold the locally trusted organisation accountable'*.<sup>23</sup> In some cases, areas have changed their locally trusted organisation as the tasks required of them have changed, but, as yet, we have limited information on the reasons for this or how the change has worked.

<sup>23</sup> Rep quarter 4 report.

## 4.2 What evidence is there that residents are acquiring knowledge and skills through Big Local support?

The direct support discussed above can be an important source of knowledge and skills, but residents also acquire these through other routes. Here we focus on three routes:

- Learning through experience, in particular, creating a profile of the Big Local area
- Using knowledge and skills that already exist locally
- Training and cascading out training to the wider community.

- **Learning through experience: creating a profile of the Big Local area**

We found plenty of evidence of residents learning through doing. Here we focus on one area where this appears to be especially apparent: the acquisition of knowledge and skills through the process of creating a Big Local profile.

This may be the first step to understanding the Big Local area. Some areas have used statistical data, such as census data or neighbourhood statistics, to create profiles – this has been the case, for example, for those profiles that have been sent to Local Trust and has provided information about issues such as employment, language, ethnicity, country of origin, gender, religion and age. One area worked with the local authority on their data to determine: *'how best to refine the data so that it is more specific'*.

Other areas have relied largely on local knowledge. This was the case with the participants in the *'hard-to-reach'* workshop described above, for example, who used shared knowledge of where hard to reach groups meet, when, and why, rather than formal data, to profile their areas. The workshop report suggests that this type of knowledge was used because groups: *'do not always have the time to gather the data or have a clear understanding of what to do with it'*.

Some areas have collected information through community researchers. This has helped them to make new connections with groups of minorities. As we explained earlier, in one area 18 residents were being trained for this, and other areas report community research skills as being amongst the first priorities of the steering group.

- **Using knowledge and skills that already exist locally**

Knowledge and skills do not have to be imported from outside the area. They may already be available locally – indeed one rep refers to the potential to tap into *'the great skills around in the area'*. Examples are given below:

**Box 6: Examples of local knowledge and skills that Big Local areas used**

- A photographer contributed to the Big Local profile; people locally designed flyers, leaflets
- A video maker created a promotional film: *'we have a brilliant film maker in the group'*
- A historical society got involved in researching the Big Local profile
- A resident worked with schools to promote Big Local to children
- A student council took part in a visioning exercise and promoted Big Local on school buses
- A resident designed a website for their Big Local area
- A local community radio programme helped to raise the profile of Big Local.

- **Training and cascading out training to the wider community**

According to data collected from Big Local reps (their quarterly reports on progress in Big Local areas), they considered themselves the first port of call when partnerships and steering groups are looking for training for their members. Examples of training that reps have negotiated for Big Local areas included: asset based community development (ABCD); credit unions and tackling financial exclusion; planning for real and community research to improve consultation; committee skills; understanding community development; and social enterprise.

Reps also emphasised the importance of providing training to the wider community beyond the steering group: *'so that expertise is entrenched in the community and gives sustainability in the long term'*. One rep described how *'A resident attended a training course in London (supported from the outreach budget) and cascaded the training to the group'*, whilst other reps explained how residents attending the 'Spring events' presented reports on their experience to others in their local area.

As we reported above, one rep described how a Big Local area is training 18 community researchers in order to broaden the range of people involved and to meet with local organisations that had not been involved to date. Further examples include: training a young person to become a youth worker locally; training three residents in skills to oversee the development of green spaces, including *'therapeutic gardening for the elderly'*.

Getting learning into the wider community can be difficult however: after some people were sent on a training course, one rep asked:

*'How much of the learning can be transferred to those who did not attend? What are the best ways to support this kind of learning? The steering group has been fully stretched this summer (dealing with a lot of emerging issues, trying to stay together and later preparing for their first Big Local activity).'*

### **4.3 Movement towards a strategic approach to skills and knowledge**

It is not clear from the data how far residents are reflecting on the specific skills and knowledge they need to acquire in order to achieve their vision for the local area. This may be because, in the period covered by this review, most waves (especially waves two and three) were at a very early stage in their development. However, there are examples of some areas taking a strategic approach to training. One Big Local area in the South East has made the local economy a priority, especially the problem of loan sharking, and has two members of the local credit union on its interim steering group. But rather than rely solely on the knowledge of the two members of the credit union, the steering group decided first to discuss their ideas with the rep to find out what support and training might be available to give other residents a greater understanding of issues related to the local economy and enterprise:

*'Training with UnLtd ... could be really helpful once the [interim steering group] has some more residents on board.'* (Rep quarterly report)

## 5. Connections

Enabling people to be better connected is one of the building blocks of Big Local, the overarching aim of the programme being that '*People are connected, people have choices and people are supported to achieve lasting change in the places where they live*'. In assessing how areas are making connections, we focus mainly on the interim steering groups that have been formed as a precursor to the Big Local partnership, because that is where we have the most data and thus the best sense of how local structures, relationships and work have developed. After reviewing progress towards developing a Big Local partnership, this section considers the range of structures being developed by interim steering groups, the challenges they have experienced and the other local organisations they are connecting with.

### 5.1 Current picture of interim steering group and partnership development

Big Local asks residents to form a group to help them to shape their Big Local work. These groups are variously called an '*interim steering group*', '*reference group*', '*community panel*', '*interim partnership*' or '*Getting People Involved Group*'. For the purposes of this review they will be called interim steering groups. Eventually these interim steering groups develop into a Big Local partnership, which is subject to endorsement by Local Trust, once a partnership approval form has been completed along with a memorandum of understanding. The requirements set out for partnerships by Local Trust include a majority of 51% residents, along with details of the structure and the selection method of the chair. The data that we discuss in this section is based on *Big Local delivery reports* to the Local Trust board<sup>24</sup>, Big Local reps' reporting throughout 2012-13 and an analysis of Getting People Involved Round 2 funding.<sup>25</sup> In Table 12 we give a flavour of the way Big Local partnerships have been developing in four examples out of the eleven partnerships endorsed across England.

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<sup>24</sup> Local Trust (2013) *Big Local delivery report, March 2013*.

<sup>25</sup> CDF (2012) *Getting People Involved (Round 2) planned activities and early learning - summary report*, London: Local Trust.

**Table 12: Four examples of Big Local area partnerships endorsed by March 2013**

| Big Local area                   | Number of partnership members | Number of resident members | % resident members on partnership | Selection method of chair         | The partnership structure                              |
|----------------------------------|-------------------------------|----------------------------|-----------------------------------|-----------------------------------|--|
| <b>Shadsworth with Whitebirk</b> | 15                            | 10                         | 67%                               | Nomination/ vote of group members | core group with advisory group/s (hub and spoke model) |
| <b>Leigh West</b>                | 18                            | 10                         | 56%                               | Nomination/ vote of group members | core group with advisory group/s (hub and spoke model) |
| <b>Firs and Bromford</b>         | 14                            | 10                         | 71%                               | Nomination/ vote of group members | core group with advisory group/s (hub and spoke model) |
| <b>Barrow Island</b>             | 16                            | 11                         | 69%                               | Nomination/ vote of group members | core group   |

Source: Local Trust (2013) *Big Local delivery report, March 2013*. A total of 11 partnerships had been endorsed. The four examples given here were chosen for their geographical spread and because they illustrated some variations in partnership development.

In most wave one areas and all of waves two and three, the interim steering group determined:

- How 'Getting People Involved'/'Getting Started' money (£30,000) should be spent
- The selection of the locally trusted organisation that would hold the grant from Local Trust and the relationships locally that would govern this
- Whether or not it needed support from a local development worker or a local organisation.

There was widespread agreement between Local Trust, Big Local reps and partners that building a partnership is a process that needs to be given time:

*'The development of the partnership has taken nearly a year, with several events, including a Big Local bus helping procure residents' views on the nature and make-up of the partnership, the selection process, the name of the partnership, and potential candidates.'* (Big Local rep)

By March 2013, 11 Big Local partnerships had been endorsed while nearly half of wave one areas and a small number of wave two areas were described by reps as being close to submitting their partnership. Reps assessed that around 30% of wave three areas, which were about three months into their life at the end of the period covered by this review, had begun the process of partnership formation albeit that they were in the very early stages of this.

## 5.2 Interim steering groups – finding the right formula

We found a wide variety of structures being tried out in Big Local areas.

- **Sub-groups**

In order to engage and collect opinions, reps report that most steering groups create sub-groups to manage specific projects or activities to carry out research; to consider applications and make first awards; to develop proposals on governance: *'helping them decide an appropriate structure to propose to the Steering Group'*. One interim steering group, for example, has set up a sub-group that will: *'meet with the [local VCSE organisation] on a monthly basis to monitor progress against their action plan and agree priorities for the coming month'*.

- **Commissioning**

Instead of creating sub-groups, some areas decided to commission aspects of the work of the steering group from consultants and community workers. Some put out tenders for specific activities such as *'developing a website'*, as well as for a *'capacity-support role'* or *'community development worker'*. These workers were often paid using Big Local money and employed through a locally trusted organisation such as the registered social landlord, local authority or a local voluntary organisation. However, several areas were able to use staff at Neighbourhood Offices, whilst one area had a community worker: *'employed on a short-term contract paid for by a combination of the City Council, a local housing association and the NHS'*. Other areas bought in assistance to work on the profile and/or plan.

- **Three-tier system**

One Big Local area in London has developed a three-tier system where an advisory board of local organisations works with an executive residents' committee drawn up from multiple *'street groups'* whose role is to engage on their own street. The aim of the *'street groups'* is to make contact with all residents who would not engage in any formal way through informal means, in order to ensure that their concerns were brought to the attention of the steering group and advisory board. This includes, for example, those with unusual working hours, transient residents and minority ethnic residents. This structure retains decision-making power with residents whilst engaging organisations through a structure familiar to them (as an advisory board) and engaging residents in transitory and informal ways on the street and in homes.

## 5.3 Challenges for interim steering groups

From the data we have identified a number of challenges experienced by many interim steering groups as well as the reps that support them. These include: leadership, understanding participation, the relationship between residents and paid workers and buying in help with some pathway tasks. It is perhaps worth saying that these are familiar challenges in community practice. But if Big Local is truly to be resident-led, it will be important to share experience across areas about how they can be addressed most effectively. It also raises important questions about how Big Local can support groups in addressing these challenges over the long-term without imposing from above.

- **Leadership**

Interim steering groups often begin developing structures through appointing a chair, treasurer or secretary, as well as creating sub-groups that will take responsibility for particular tasks. For some areas this works well – it provides the area with strong leadership and someone who can liaise with the rep. But this is not always the case; it relies on the

chair being someone that not only *'gets what Big Local is about'* but also can explain this to other steering group members.

Whatever the membership, rep reports suggest that managing different personalities and agendas can be difficult:

*'The chair is in a tight spot balancing his convictions with personalities and politics ... an opportunity to bring clarity and due process to developing the Big Local plan has been lost for the time being and sadly with it, people have become more entrenched and the risk of 'us and them' divisions [with the interim steering group] deepens.'* (Rep quarterly report)

- **Understanding participation**

Often the groups settle down into *'a smallish group of dedicated people'*. This does not mean they are necessarily exclusive. Last year's annual learning review highlighted the challenges of finding a balance between the leadership that is necessary to progress through the pathway and the need to reach out as far as possible into the community. But in some areas, reps report that supporting steering groups to understand the principles of participative community development has proved complex, for example, the difference between consulting and engaging:

*'[I] have made suggestions and offered to organise different activities, including a training session on participative methods but none of these have been taken up.'*

There is a particular issue in relation to so-called 'hard-to-reach' groups. In Living Space Project events described earlier, some local participants were resistant to spending time trying to reach all parts of the community for the reasons listed below:

**Box 7: 'Hard to Reach' Workshop, extract from *Learning Paper about Reasons for not working to include all groups***

- fear of the unknown or of offending
- British National Party connections in an area or anti-foreigner sentiments
- tensions between different communities
- lack of time to invest in the issue as they had to focus on writing the area Big Local plan
- a general feeling that the Big Local area operates an open door policy so no-one is stopped from being involved and so no-one should get special treatment.

Others argued that it may be Big Local that was: *'hard to reach rather than the other way round'* (Living Space Project report).

Reps have used a number of approaches to address these issues and develop residents' understanding of participation. One rep in Yorkshire resisted the temptation to develop an interim steering group too early:

*'I have consciously used the tactics ... of facilitating a series of open meetings over two months with a high degree of transparency and involvement in decision-making, rather than forming a [interim] steering group. These have involved small group/table based discussions, participative budgeting and other techniques. Attendance has been broadly representative of the very mixed population across the area.'* (Q1 rep reports)

The *'street groups'* mentioned in the previous section represent another approach. They are a way of working with residents who may not have capacity to get involved in a structured way but feel able to be involved informally and transiently, through chats on the street or with cups of tea at home. Another approach to engaging these residents has been through hiring a community worker to engage in a 'listening campaign' of small meetings in churches, cafés and homes, so that the opinions and experiences of people who do not engage with Big

Local formally can then be relayed to the steering group. In one highly diverse area, this approach has allowed the steering group to hear from minority ethnic residents, those on low incomes and/or benefits and those who are resident for a short period, with the result that it is able to focus activity on issues that are directly affecting these people.

- **The relationship between residents and paid workers**

Whilst a Big Local partnership has to be 51% residents, there is no such demand on interim steering groups. Like Big Local partnerships, these interim steering groups often include a range of paid workers and local organisations, such as local authorities, parish councils, voluntary sector organisations, registered social landlords, business forum representatives and schools, as well as residents.

This is not surprising given the high profile of Big Local and, elsewhere in this review, we have commented on the importance of involving other local organisations. Sometimes, achieving a resident majority will take time, as confidence, knowledge and skills are developed locally. But it is important to strike a balance if non-residents are not to dominate proceedings, as the following rep reports demonstrate:

*'There is capacity, but this has been squashed/underused by over-management by Lead Org [locally trusted organisation] staff and Council up till now, in my opinion.'*

In 'Getting People Involved' Round 2, CDF reports that: *'typically... challenges were addressed by using methods such as electing a chair, agreeing a code of conduct and improving two-way communication ... for example, between residents and councillors'*. In the first example above, the balance in the group has evolved with residents now taking leading roles, but this is not always the case. One rep described how: *'we lost the residents we had some time back and it is difficult to get past the officers ... We now have mostly councillors and council officers'*. The second example reminds us that sometimes councillors and/or paid workers are also residents. The rep working in this area remarked that having a 51% resident majority may not be enough to ensure that all the residents present have an equal voice.

- **Commissioning**

The previous section described how some areas have hired consultants or community workers to carry out tasks associated with early set up. In many cases this has worked well for them. But there have been some cautionary tales, with reps arguing that hiring external support often took a great deal of time and effort and made processes more complex. There are several examples where attempts to speed up progress through the pathway in this way had the opposite effect. One area that had tried to engage consultants found it necessary to restart the commissioning process, stretching this process over many months. Another area agreed to a suggestion from their registered social landlord (also the locally trusted organisation) to use psychometric tests and scored interviews to hire a part-time development worker. When a decision between two candidates could not be made, they had to be re-interviewed, with the: *'Big Local rep invited to attend the interview as the impartial person'*. A third area hired consultants to collect profile data, but the rep argued that: *'Because a lot of the community-based work was done through external consultants, it is very difficult to assess effectiveness as the consultants were so terrible'*. In this instance, the steering group were not empowered by just getting the results of a survey and their attempt to move more quickly through the pathway meant that an opportunity for the steering group to build on their own local knowledge was lost; the steering group were left with a poor quality report and no skills in research and community profiling.



## 5.4 Interim steering groups – connecting with other organisations

Big Local is not operating in a vacuum at local level and getting other local (and sometimes national) organisations involved at an early stage is seen as vital if areas are to draw on all the resources and skills available locally. They can provide the Big Local area with practical support, as we saw in Section 4; and many share common aims and goals, such as health issues or community safety, and are open to a dialogue about Big Local plans. As one rep reports, local organisations: *'have all been briefed on Big Local and are very keen to get involved'*. Specific examples given by the Big Local reps in their quarterly reports include: Primary Care Trusts, The Prince's Trust, a hotel group, English Heritage, local schools, local charitable and voluntary organisations, Surestart, the local authority, Joseph Rowntree Foundation, registered social landlords, business networks, women's networks, parish councillors, arts collectives – the list is long. In some cases, steering groups have engaged in joint activities with these organisations. For example, one rep explains how Groundwork, an environmental charity: *'carried on following their work programme in conjunction with the steering group'*, whilst another steering group are *'working closely with a local history group to produce their profile and that is proving very fruitful'*.

These important connections rely on three kinds of broker: the Big Local rep; key people in the community who are already active and who have decided to support Big Local; and key individuals hired to play a community development role. These individuals may be located in the locally trusted organisation and/or they may sit on the interim steering group.

*'[The] Council's neighbourhood officer has been supporting the steering group with advice, signposting, helping to run local events, linking to community initiatives in other [local] areas. He also agreed to be a mentor for the [Big Local] worker'*

*'The [locally trusted organisation] has been supporting the awareness raising of the Big Local through a great deal of local activity.'* (both: Q4 Rep report)

Having well-connected individuals on the interim steering group helps Big Local areas to make new connections quickly. For example, in one area Big Local has been able to partner quickly with the local authority because the deputy leader is a member of the steering committee. However, this was also perceived by interim steering groups as a risk according to reports from the reps that work with them: they thought that Big Local may be seen as a local authority initiative and/or that opportunities to connect with other organisations may be missed. One rep suggested that an *'opportunistic approach'* might be best, *'building on the openings presenting themselves'*.

## 6. Making choices

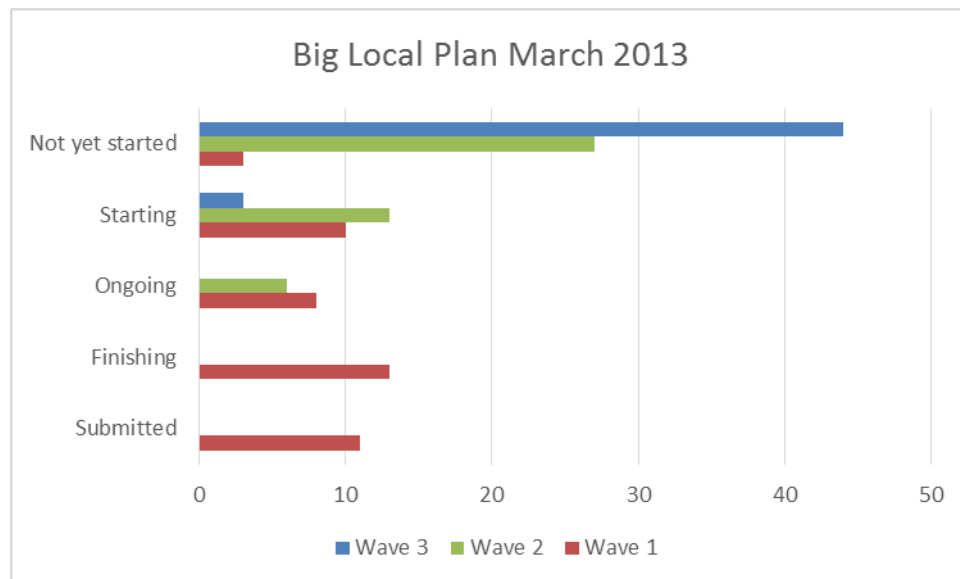
Big Local seeks to enable each of its communities to ‘make a difference to the needs it prioritises’. It is far too early to say whether or not this is being achieved. But the theory of change refers to communities having choices and this section considers the kinds of choices they are making in their plans, what they have done at this early stage, and the extent to which they are taking up options in relation to social enterprise and investment. It ends by considering the benefits to the areas of being part of a national programme.

### 6.1 What is in the plans submitted to Local Trust so far?

There are two sources of data about Big Local plans: Local Trust’s data tells us about plans that have been submitted and endorsed; reports from reps provides a broader picture of their assessment of progress towards areas completing their Big Local plans.

Table 13 below illustrates Big Local reps’ assessment of areas progress towards submitting a plan to Local Trust. To provide a broad overview of progress in the 150 areas towards submitting a plan, the Q4 rep report suggests that a large number of wave one areas are still developing their plans, whilst wave two areas are beginning to get to grips with creating a plan. The majority of wave three areas are unsurprisingly not considering their plans. Analysis of submitted plans may offer insight for other areas into planning.

**Table 13: Big Local reps’ assessment of areas’ progress towards a Big Local plan**



Source: Rep quarterly reports 2012-13

The areas that have submitted plans identified a range of activities, which we have classified according to 12 broad themes listed below, with examples of specific activities and sub-themes in column two. The themes are ranked according to the number of areas giving them priority.

**Box 8: Themes that appear in Big Local plans**

| Theme                            | Description of activities, themes, words and phrases   |
|----------------------------------|--|
| <b>Young people</b>              | Skills, activities, training, achieving potential, music workshops, outdoor activities, life skills, motor workshops, outreach provision, NEET support, reading in schools, role models and local talent awareness   |
| <b>Community spirit</b>          | Community spirit, intergenerational activities, participation, social activities, cultural events, public art, multicultural activities, community association bursaries, community café, residents' charter, reduce resident 'churn'  |
| <b>Skills, jobs and training</b> | Employing local development workers, basic skills support, employment placement scheme, social enterprise, career advice, volunteering schemes, entrepreneurship awards, business start-up workshops/loan scheme, business buddies mentoring/forum, help to grow voluntary sector  |
| <b>Elderly</b>                   | Intergenerational, social exclusion, support, caring services, friendship maintaining mental health, storytelling, DIY help, adopt a grandparent, community transport, tea dances  |
| <b>Health and wellbeing</b>      | Community fitness instructors, nature walks, climbing wall, BMX track, stop smoking campaign, alcohol reduction initiatives, five a day, drugs awareness, sexual health, fitness classes for those with additional needs, medical and dental facilities                            |
| <b>Local environment</b>         | Community gardens, allotments, clean alleys scheme, road clean ups, community skips, anti-litter campaign, litter and dog bins, cycle paths, impact of regeneration and planning (HS2, new roads, new housing), tables and chairs in public spaces, wasteland map, tree and plants |
| <b>Family</b>                    | Pre-school activities, afterschool clubs, concerts, counselling, parenting skills, fun days  |

|                             |   |
|-----------------------------|---|
| <b>Financial exclusion</b>  | Loan sharking/doorstep lending, credit unions, cooking on a budget, welfare rights advice   |
| <b>Safety</b>               | Crime surveys, develop relationship with Police, CCTV, Neighbourhood Watch, tackling anti-social behaviour  |
| <b>Community facilities</b> | Community centre, public art, purpose built sports facilities, physical improvement of public buildings (walls, stairways, etc.), improve health centre                       |
| <b>Housing</b>              | Lobbying landlords and registered social landlords, 'broken window' syndrome, poor tenants, rights of tenants, household improvement loans from credit union, washing windows |
| <b>Local minorities</b>     | Hard to reach, ethnic minorities, gypsy and traveller groups, hate crimes, marginalised groups, awareness raising of minority groups.   |

Each of the Big Local areas that submitted a plan focussed on between three and 12 priorities, and some areas developed cross-cutting themes, such as 'older people and intergenerational activities' or 'young people and skills' or 'participation and intergenerational activities' that are not captured in the categories above.

Some Big Local areas specified an overall goal, for example *'a place where all feel welcome, all feel they belong, and all feel they can flourish, whatever path has brought us together'* and *'a better community for all, including the hard to reach groups, to live in'*. In the second example, the area explained how they plan to achieve their goal by using the tenants' and residents' alliance and community organisations to expand their outreach work and increase participation from all residents. However, the area does recognise that other local initiatives are also seeking to create change: *'we should emphasise that these plans are what we'd like to see'*. As such, they hope that their Big Local money may *'kickstart regeneration ... to lever in additional funds'*.

## 6.2 Initial activities

The most visible achievements on the ground in the period covered by this review related to the common need to get people involved and demonstrate quick wins; these were often the result of planning and visioning with residents. They included *'clean and green'* activities, such as litter picks, 'clean up days' and planting flowers and shrubs, as well as improving shop fronts and public buildings. Visual impact was clearly important, providing a common denominator for residents: *'gradually people started coming out of their houses. It was fantastic, there were lots of people from different backgrounds and different ages who hadn't talked to each other'*.

Activities were also encouraged through small community grants. These included paying for transport for outings; keeping a community minibus on the road for shopping trips for older people; paying for Santa at an event; swimming for a disability group; sporting equipment; and cooking projects. These grants were welcome as a way of engaging people with Big Local.

### 6.3 Social enterprise and social investment

Big Local is keen to promote social enterprise and social investment as possible approaches to meeting the needs areas have identified.

- **Social entrepreneurs**

During the period 2012-13 209 awards were made. One area described the effects of these awards as having: *'allowed us to develop ... in ways we'd only dreamt of'*. Across the 47 areas, these awards have gone into a wide variety of activities including sports coaching, handymen, mums' groups and childcare, youth workers, computer repairs and re-sales, a timebank, training, and a community laundrette. UnLtd in their analysis identify themes:

- Helping young people to make positive choices
- Helping young people to gain skills and access employment opportunities
- Providing services for older and socially isolated people
- Supporting people with mental health issues
- Providing new opportunities to develop community health and wellbeing
- Providing new community resources
- Creating new pathways for young offenders.<sup>26</sup>

Big Local areas had different ideas about what Star People awards might best be used for and these ranged from physical improvements such as window cleaning to supporting local people's education and training. Our understanding of these awards would benefit from data about how UnLtd's award managers have interacted with Big Local areas, in particular who award managers have worked with to gain access and their relationship with interim steering groups, Big Local reps and those engaged in social investment work on the ground.

- **Social investment**

During one quarter of 2012-13<sup>27</sup>, we learned that 39% of wave one Big Local reps had begun discussing social investment in their area, reduced to 18% for wave two, while 44% of wave one plans featured social investment (mainly focused on links with credit unions and tackling loan sharking).

Areas were developing relationships with credit unions. One Big Local area stated in its profile that it will be: *'investing some of the £1million funding into the credit union so that the credit union can target people in the Big Local area'* and *'we have earmarked £150,000 ... for social investment'*. As stated earlier, another area had invited credit union staff onto its steering committee to ensure that its social investment theme succeeds.

Ways of investing in the community through the credit unions included *'start-up loans; organisations who provide support to young people; direct support for families'* and *'low-interest home improvement loans'*. One area, with the help of the credit union, wanted to: *'purchase and rent our own properties, explore low cost mortgages and shared equity schemes'*. Areas had also identified a desire to invest in *'green businesses'* which could be: *'maximising recycling ... expand the use of environmentally friendly heating/power generation/water recycling, etc.'*. Credit unions are also well placed for *'money management skills and benefits advice'*.

<sup>26</sup> <http://www.localtrust.org.uk/wp-content/uploads/2012/11/UnLtd-Big-Local-social-impact-blog-FINAL1.pdf>

<sup>27</sup> This period was September to November 2012 and the data was collected via the reps quarterly reports.

For one steering group the rationale for investing in social enterprise is directly related to the idea of being resident-led: *'there is a sense of ownership of the activities being undertaken, where it is self-funded and self-sufficient'*. However, at the time covered by this review not all areas were ready for social investment. In their quarterly reports, some reps suggested: *'it is too early for Big Local areas'*, that *'areas are not interested'*; that *'it's too hard for areas to understand/too complex'*.

#### **6.4 Benefits of being part of a national programme**

Areas described benefits to being part of a national programme. Many areas felt they had been *'taken seriously'* by local authorities and decision makers, charitable foundations, local voluntary organisations, Primary Care Trusts and businesses. Steering groups had held conversations with those involved in major developments including HS2, the railway programme and Crossrail in London. Whilst Big Local may not influence these major development agendas, it can certainly highlight the capacity of people to work towards shared goals when consulted. For instance, in one major development in London, after meetings with the developer, the interim steering group had added to its own targets jobs for local people at the development. Before the meeting it was felt this was outside the influence of the interim steering group.

Big Local areas had also been able to use their involvement in a national programme to draw in funding from, amongst others; housing associations; Tesco; Asda; Jubilee Fund; Community First; the Situ Foundation; local authorities; and churches. In one area £130,000 additional funding has been secured for community facilities and in another a local charity has agreed to match fund the entire £1million.

## Part Three

### Conclusions and implications for Big Local

This review is intended as an internal resource to help Local Trust to focus on the implications of Big Local experience so far for future development. It also highlights some of the challenges and possibilities of data collection as Local Trust commissions the first in a series of independent evaluations. It aims to identify:

- The learning that is emerging from Big Local experience to date
- The questions this raises for future development
- What's missing, what more do we need to know.

#### 7. Emerging learning from Big Local experience

The first annual learning review reported on wave one and the early stages of wave two. At the end of the period covered by the current review, all three waves had started, although wave three was only three months into its life. This review reinforces the findings of its predecessor – that context matters and that areas approach the pathway in different ways and certainly not as a linear process.

The information we reviewed suggested that light touch support continues to be valued by many areas. Areas are also taking up opportunities to learn new skills as well as the chance to increase their knowledge about issues that interest them, whether that is growing food locally or supporting social enterprise and investment.

Our review showed how each element of the pathway was providing areas with a structure as well as opportunities to learn. For example, gearing up for a Big Local partnership provided the impetus for residents to learn about chairing and negotiating skills. And the need to prepare a Big Local area profile meant that residents developed a greater understanding of their areas, especially those that went beyond the usual census-based data, and trained residents in community research skills.

As areas continue through the pathway and on to putting their plans into action, three main themes emerge from this review that would merit further discussion and examination. These are: how different sources of support are combining at local level; how areas are developing their approach to developing their plans for using their money; how Big Local is addressing the challenges of being resident-led.

##### 7.1 Non-financial support in Big Local areas

This review has described a range of sources of local support for Big Local areas. Principal among these are the locally trusted organisation, local community workers – either those that areas have hired to help them with their development, or those already working in the area - and consultants who may be paid to help with particular tasks. Different patterns have emerged: areas have made different decisions about the type of support they need and some kinds of support have proved more effective than others. If we are to learn how Big Local areas can best be supported, it will be important to know how these various sources of support are combining and to learn how their contribution can be most effectively integrated with that of the Big Local reps and partners.

One theme that emerged from the findings this year is the relationship with the locally trusted organisation. In some cases, this has remained the same organisation throughout; elsewhere areas have changed their locally trusted organisation. As areas progress further



through the pathway, there is potential to learn much more about how these relationships are working out in practice.

A second theme relates to the experience of commissioning parts of pathway tasks – while this is often positive, particularly as residents on the interim steering groups chose the commissioning process, there have been times when it has hindered progress rather than helped. There may well be learning from this to help areas make these decisions in future.

Thirdly, there are also some real gems of peer support and resident-driven inquiry (the resident-initiated learning event, community research) but they are scattered at the moment. How can Big Local and partners build on these ‘gems’?

## 7.2 Areas begin to develop their approaches to financial support

In 2012-13, we began to see how Big Local was levering in other forms of funding or in-kind support, including match funding and agreements with local authorities to return buildings to community use. This continues to apply to all waves. We also began to see some local areas moving tentatively towards thinking about investment and finance as well as grants. In 2012-13, this has gathered momentum.<sup>28</sup> Social investment has tended to move onto the radar of areas once they have become confident about their overall plan. Initially, where Big Local areas expressed their intention to engage with social investment, there appeared to be little understanding about what this might mean in practice. Very few areas were ready to act but wanted support to get to know how to do social investment. Reps brokered this.

## 7.3 Making resident-led a reality

Central to Big Local is its determination to be resident-led and avoid the mistakes of the past, where community programmes, despite the best intentions, have been led from ‘the top’ rather than the ground and so often fail to deliver lasting change. Big Local is crystal clear that it is not a programme where outside bodies tell residents what to do. But previous studies, including *What is New and Different*, commissioned by Local Trust, have identified a number of challenges in relation to being resident-led. Big Local has now reached a point where it has its own practical experience of these challenges and how they are being addressed, as well as concrete examples of where areas do appear to be resident-led and where this is proving difficult to achieve. At a time when the School for Public Health Research (SPHR) study has been launched to look at the relationship between resident control and health in Big Local, there would be some value in unpacking what Big Local aspires to in terms of being resident-led and what is helping and hindering this aspiration on the ground.

- **Which residents?**

Firstly, there is the question of ‘which residents’ are leading – is Big Local involving residents who have not been involved before, especially the so-called ‘hard-to-reach’ groups? And how are local areas achieving this?

Getting people involved beyond the partnership is something that will need to continue throughout the life of Big Local. Areas have to balance the need to show progress in terms of developing the partnership, profile and plan with the need to get more people involved at every stage. Different areas are approaching this in different ways, but reps report that in some areas it has been difficult to embed an understanding of what participation should mean. Indeed, during a ‘Hard to Reach’ workshop (run by Living Space Project) it was suggested that some residents do not share Big Local’s ambitions to draw in other parts of the local community, while others have suggested that *‘the “hard to reach” may feel that Big Local is hard to reach’*.

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<sup>28</sup> Now, in 2013-14 we are seeing a stronger connection between grant-making and investment in Big Local areas.



- **Are residents leading?**

Secondly, getting the 'formula' right for the interim steering group and subsequently the partnership is taken very seriously by residents. But even if residents are in the majority, it does not necessarily follow that they have the greatest voice – other members can still dominate, sometimes without even realising that they are doing so. Building residents' confidence not only to speak up 'in front of professionals' but also to challenge them will be critical to making resident-led a reality both in these mixed interim steering groups and in the formal partnerships that emerge to put plans into action.

- **Getting a balance between resident and external knowledge**

Thirdly, the principle of 'resident-led' also raises questions about the balance between resident knowledge and that of external knowledge, for example on the local economy. This was especially apparent when preparing Big Local profiles, for example, with some areas debating what kinds of information would be 'best' rather than seeing residents' familiarity with their local area on the one hand and official statistics and other input on the other as complementary. Both kinds of knowledge are needed: residents will not have all the knowledge they need for effective decision making; outside contributors will need to be guided by residents in applying what they know to the local situation.

- **How to encourage a 'bottom-up' approach from national level**

The question of what resident-led means will be an important one for Big Local as it progresses. What can it do to ensure that areas meet the challenges we describe head on and embody the principles that Big Local itself espouses both now and into the future? How can Local Trust, as a national organisation, ensure that local areas meet these challenges without appearing to impose solutions and take control? There may, for example, be times when residents themselves need to be challenged about who they are involving and how. The reps are currently the principal means through which Local Trust supports Big Local areas in this part of their development (alongside Living Space Project work on equalities). But, as the programme progresses, the potential will grow for areas themselves to share, promote and spread effective practice.

## 8. What's missing, what more do we need to know?

We have made a substantial number of comments about the issues that would benefit from research over the coming year and what Local Trust will need to do about data collection in order to make this feasible. This is because we think Local Trust is in a good position to tackle these, as we discuss further in our concluding remarks.

### • Areas for further exploration

The discussion above and with Local Trust has also identified a number of issues for exploration where further data would be invaluable. Last year's annual learning review also raised a number of issues for further exploration. Taken together, these include:

- The nature of the relationship with locally trusted organisations
- Variations in rep experience and support – what works best where?
- Patterns of support/scaffolding: how reps, local community workers, locally trusted organisations work together
- How partnerships are evolving and dealing with the challenges identified above including:
  - How they are continuing to involve the wider community; and
  - Whether there is potential for lessons from the work on national collaborative working to inform the development of collaborative working locally (including ideas about relational contracts)?

As partnerships move beyond the planning stage and into action, there will also be a great deal to learn about the choices they are making, the support they continue to need/value, the contribution social entrepreneurs and social investment can make and the difference they are making.

### • Future data collection

There were some gaps in the data that we had available for this annual learning review. We are aware of the need to avoid overloading Big Local areas with data requirements, and it may be that these questions can be addressed through specific studies throughout the year, or indeed by future evaluations. But partners can also be a rich source of information. We also need to ensure that we are capturing good outputs. We therefore suggest specifying data requirements for partners and relating them to the Big Local programme outcomes. Based on our experience of carrying out this annual learning review, this might include:

- Providing guidance about how to record learning from events so that we can understand how this affects practice in Big Local areas.
- Making provision for analysing the qualitative data collected from reps.
- Asking UnLtd staff to provide similar written reflections about their activities that could be analysed.
- Being explicit about each partners' responsibility for data collection and analysis and ensuring there is some consistency between partners. For example, we did not have enough data about support for social entrepreneurs to be able to relate this activity to other Big Local activities .e.g. whether individual Star People Awards contribute to the wider plan/is the wider plan building on them? In what ways are they benefiting the area as a whole as well as the individual recipients?

## 9. Concluding remarks

The year 2012–13 saw a substantial amount of activity, relationship formation and adaptation as more and more residents became a part of Big Local. We finish with observations on three ‘states’ of the programme.

*Consciously evolving.* During an early discussion about what Big Local might be and do, a rep likened the evolution of Big Local to a Wallace and Gromit film (*‘The Wrong Trousers’*) where the characters are still laying down the track while the train in which they are travelling is still moving. Writing in the early 1990s about education and change, Paolo Freire said *‘I am sure we make the road by walking’*. Whichever image you prefer, the impression in 2012–13 is of a programme that continues to evolve *consciously* and one that has begun to embed that mindset in both its strategy and its practice.

*Reflecting together.* This is easier said than done and it will be hard for a national organisation to reflect *jointly* with residents across 150 areas about what is working well, less well and why. Despite this, Big Local has begun to break this ambitious task down into smaller opportunities for joint reflection in action learning sets, workshops and at events. The challenge now will be to ensure that joint learning is captured and communicated across the programme, leaving room to talk about mistakes as well as celebrate success. In particular, to talk frankly together about what, practically, we mean by ‘resident-led’ and share and discuss the challenges of achieving this.

*Learning.* There is tangible evidence of local learning, particularly around new ways to think about, and do something about, local finance and local economies, as well as the mechanics of taking charge of what happens locally, including: becoming skilled and confident organisers of events; acting as leaders or participants in meetings; and grabbing hold of social media as another tool for involving people. Over the coming year, we will be able to ask more questions about where and how people are using what they learn.

## Appendix One: Data used against the evaluation questions

This appendix examines what data was used to answer the questions agreed with Local Trust. Data files were input into Nvivo 10 and coded against the questions below.

Data is:

Rep quarterly reports Q1, Q2, Q3, Q4 spreadsheet data; CDF '*Getting Started*' '*Getting People Involved*' reports; Renaisi quarterly reports syntheses; NANM Spring event and learning reports; Living Space Project workshop reports; Local Trust publicity case studies; Area documents submitted to Local Trust; Small Change quarterly reports; UnLtd update 2013; Local Trust board quarterly reports.

| Question  | Data Used   | Notes on the data   |
|---|---|---|
| What kinds of support (learning events, reps, awards managers) are residents using and finding helpful? | Rep reports, Area Documents, Partner reports                        | Reps briefly comment on what support and information they offer, but also where other support is found, i.e., the locally trusted organisation, other local VCSE sector organisations and local authorities. Partners described their activities in Big Local areas, i.e., Small Change and Twitter; areas described support they had accessed, Lots on formal support mechanisms, less on informal – resident-led event good for this. |
| What evidence is there that residents are acquiring knowledge/skills?                                   | Event papers, Partner reports                                       | The event reports from NANM and Living Space Project were based on comments from feedback forms about this. That is the only first-hand evidence. Rep reports detail training or present skills in communities.   |
| What evidence is there about what support residents want/find helpful?                                  | Rep reports, Area documents, event papers                           | Difficult to answer – data was often not the resident voices but partner or rep voices. Area documents spend less time discussing relationships, and more on activity or fact.  |
| How are Big Local partnerships developing in terms of structure?  | Area documents, rep reports, CDF report, Local Trust board reports  | Strong data for areas who have submitted partnerships, rep data reflects difficulties in developing interim steering groups and different structures for those who have not submitted.  |
| Who is/has been on Big Local partnerships (individuals/groups/organisations)?                           | Rep reports. Area documents, Partner reports                        | Rep reports detail individuals and names of organisations; area documents detail partner organizations; ' <i>Getting Started</i> ' ' <i>Getting People Involved</i> ' report from CDF explores locally trusted organisations for wave one only.   |
| Who is involved (residents) in Big Local beyond the partnership and how is this happening?              | Rep reports, Living Space Project hard to reach workshop report     | Difficult to answer – reps report getting people involved activities broadly, Living Space Project's workshop report highlighted barriers to involving the hard to reach. Not enough data on star people awards and how this links to wider Big Local activity.   |
| Who is involved (organisations) in Big Local beyond the partnership and how is                          | Rep reports, CDF ' <i>Getting Started</i> ' ' <i>Getting People</i> | CDF ' <i>Getting Started</i> ' ' <i>Getting People Involved</i> ' reports touch on this. More detailed research needed, especially into locally trusted organisations – most chosen are independent VCSE sector organisations – why?  |

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| this happening?   | <i>Involved'</i> reports                                  |   |
| What evidence is there of new relationships being established, with whom, for what?   | Rep reports   | Determining 'new' is difficult without relationships described as such. Rep reports allow checking across the reports for what is 'new' (or at least previously unreported).  |
| Have areas got a plan/ how far are they along the route to getting one?<br><br>What sort of things are in the plan?                   | Area documents and rep reports, Local Trust board reports | Reps were clear about at what stage areas were at on the pathway to getting a plan, and in some cases detailed contextual factors. Area documents where plans were submitted allowed collation and comparison of details.   |
| What needs are being identified in local areas (e.g. in profiles)?  | Area profiles, Local Trust board reports                  | Issues in profiles were identified by well-known indicators: i.e., poverty, health, debt and by identifiers, i.e., gender, age, ethnicity using super output areas data for instance. Numbers of unemployed, etc.<br><br>Some areas described the results of a consultation process which did identify what the community 'needs' according to the community: crime issues, health, mental health issues. These were slightly more specific and anecdotal.<br><br>Ways people interacted in the area (i.e., informal meeting spaces, hiding places) And linking this to ethnicity, gender, cultural practices, working hours, etc., was missing. A more dynamic analysis about movement and activity would be good, i.e., what do the unemployed do – where do they go – when do they go there? |
| What evidence is there that areas are setting goals and specifying steps to achieve it?   | Area documents, particularly plans                        | Area plans were useful for setting out goals, detailing timescales, and identifying activities to achieve the goals. Only 10 plans however.   |
| What evidence is there that areas are putting their learning about community enterprise and social investment into action?            | Small Change papers, rep reports                          | Small Change detail engagement with Big Local areas online and at learning events.<br><br>Reps detail whether areas 'get it' and their state of readiness.  |
| What have people been able to do so far, and what has this achieved?  | All   | Broad question – the total of success is not easy to grasp given the diversity. Good news includes clear successes in completing the pathway, and the increased success below.  |
| What evidence is there that areas are deriving benefit from being part of a national programme (e.g. leverage of additional funding)? | Rep reports, area plans                                   | Reps report where a major success with a national partner is achieved – and areas detail future plans with these. Some partners are impressive but there is less info on how this makes the residents feel.   |