

Big Local partnership guide

Version 1, 14 December 2011

This document will be developed over time with input from the people using this material. If you have thoughts on how this document can be made more useful for you, particularly if you live in one of the Big Local areas, please let us know. You can talk to anyone working on Big Local by ringing 0207 812 1573 or emailing biglocal@cdf.org.uk.

To ensure you using the most recent version please check that the version number and date above match the most recent version which can be found [here](#).

A note to the reader:

This document includes a large amount of detail about the Big Local partnership. Some of it may not be relevant to your local area at this time. We encourage you to keep this as a resource to use when your area is ready or as questions arise. Please also use your Big Local representative to help you identify the most relevant information for you and discuss how it may apply in your area. We will be working to prepare a shorter overview of this information which may be more useful for you to share across your local area. The shorter version will be available in early 2012.

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Introduction

A key feature of Big Local is a partnership that guides the overall direction of Big Local in your area. Some of you will already have experience of programmes and partnership working to achieve a shared vision. Our vision for Big Local is that it is a genuinely local, resident-led programme; working with voluntary and community groups, local authorities, councillors and others; providing residents with support, skills and opportunities to make a difference to where they live. Essentially it is a programme whereby local people provide recommendations in good faith as to how their local area can be improved. In some areas we know residents are already fully involved and will be key members of the Big Local partnership from the outset. In other areas we know these discussions and resident involvement is at an early stage and will increase over time. We suggest you read the guidance with this in mind. Remember that the Big Local partnership is a group that oversees Big Local in your area to ensure it meets the Big Local outcomes and honours Big Local's six key features.

Big Local's four outcomes are:

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 can continue to identify and respond to local 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

Big Local's six key features are:

1. Continuous, inclusive, thoughtful involvement of local people
2. Accountable local partnership
3. Maximising long-term, inclusive benefit
4. Building capacity and sharing learning
5. Flexible and realistic planning
6. Additional to public money

Further information about Big Local can be found at <http://www.cdf.org.uk/web/guest/biglocal>

What is the Big Local partnership?

The partnership is a group of people who together are responsible for the overall direction of Big Local in your area. The partnership must make sure Big Local connects with and involves many different people from the area.

The partnership includes a mix of people, the majority of whom live or work in the area. Getting the right balance between people who live in the area and people who work in the area is important to the success of your partnership. Big Local should reflect the views of different types of people *living* in the area because Big Local is about making your area an even better place to *live*. It is also important to include people who work in the area, and we encourage you to find people who really know the area well. This might be someone like a local business owner or someone who's place of work is within the local area. It might also be someone from a community organisation or a housing association, or the local authority. A diverse group of people with different perspectives, experiences and strengths all working to achieve the vision for your area will help to build a strong, successful partnership. Membership of the partnership will be reviewed annually and will change over time to reflect the development and changes in your local area; the first members of the partnership might not be the same members in a few years time.

Each partnership will be designed to reflect your area and therefore will be different. However, each partnership must meet the following membership criteria:

- At least eight members.
- Majority (at least 51%) of members are individuals who normally live and/or work within your Big Local area's boundaries.
- Members reflect the range and diversity of people who live in your local area, for example, in relation to age, ethnicity, gender, faith, disability or income levels.
- Majority (at least 51%) of individuals are members in their own right, rather than formally representing interests of other organisations. Remember that the member's primary role is to help make partnership decisions that are best for Big Local in your area.

As long as you meet these criteria, your partnership can take many forms and should be designed to best suit your area. The partnership's name, membership and structure are flexible.

When considering the best structure for your area, you should think about the partnership's important responsibility of connecting with and involving people from across the area. How you set up the partnership should make this possible and prevent the partnership from becoming an isolated group in your area without meaningful connections and networks with other people who live and work there.

Big Local partnerships are likely to work with groups, networks, other partnerships or associations that already exist. If your partnership is going to link to an existing partnership, network, association or group, for instance become a sub-committee, then you must be certain that the responsibilities of both the Big Local partnership and the other body can still be achieved. If your area is considering this approach, it is important to listen to what people in your area are saying through the Big Local visioning and planning stages to ensure that they see this as the best option for Big Local in your area.

Some areas are considering creating a new registered charity or incorporating their partnership as a registered company. This is not part of Big Local's requirements and setting up a new registered charity or company should be explored thoroughly. If considering these options, areas should think about a range of issues. Examples of a few considerations include:

- Ensure that any governing requirements for a formally constituted group or organisation are not in conflict with the Big Local partnership requirements.
- Consider any potential conflicts of interest which may arise because of the structure of the organisation that your local area creates.
- Identify the liability requirements of the organisation and its trustees or directors.
- Think about whether this option matches with what people from the area are saying through the Big Local visioning and planning stages.

Further details can be found at the [Charity Commission website](#) or [Companies House website](#).

Whatever decisions your area considers for your partnership, remember that it is important that the partnership is flexible in its design so that it can change over time. What your area needs in the first few years of Big Local may not be what it needs in year three, five or ten.

What are the responsibilities of the Big Local partnership?

This section discusses what the partnership does and how it works. Both are equally important and are designed to make the most of the Big Local resources as well as the assets that exist in your area.

What does the partnership do?

The partnership **guides the overall direction** of Big Local for your area. This means the partnership has responsibility for:

- using the shared vision (a common statement of what people from the area think would make the area an even better place to live) and creating a detailed plan (known as a Big Local plan) of how the shared vision is going to be achieved

- making sure the Big Local plan is carried out and that Big Local money is used in the best way possible.

The partnership's work is guided by a process that we refer to as the Big Local pathway. Below are the stages of the Big Local pathway that the partnership, once formed and endorsed, will generally follow. (For more detail about the Big Local pathway, please refer to the [Big Local overview document](#).)

- **Agree a shared vision.** During the earlier stages of the pathway your area will have collected different views from a range of people about how they think your area could be a better place to live. From this range of views the partnership will agree a shared vision. These views, along with other important local information, are found in your area's Big Local profile.
- **Create a Big Local plan.** The partnership will create a plan that identifies ways that you will achieve your area's shared vision over time.

The Big Local plan will explain the area's long term plans for using the £1 million over 10 years to make your area an even better place to live. It will provide a longer-term view on how the £1 million will be used via grants, social investments (loans that will benefit the local area, made to individuals, small businesses or groups) or buying services (procurement).

It will also include shorter-term objectives and more specific activities. The plan will include information on how much your area will spend each year and how. According to this spending estimate, your area will be able to draw down money from your allocated £1 million. The partnership will oversee the Big Local funding in line with this plan.

This plan will also set out what other resources your area might use to support the Big Local work. This could mean finding ways to link with other funding in your area, or finding ways to draw out the skills and energy of people and other businesses and organisations locally.

- **Carry out the Big Local plan.** The partnership will specify what needs to be done to carry out the Big Local plan. This does not mean the partnership will *do* all of the work themselves. It will make sure that people who live and work locally in the area are involved in overseeing and determining how things are done. For example, it might mean that through the visioning process your area identifies that there is a lack of things for young people to do and an action would be to run a grant programme so that organisations could provide additional activities for young people in the Big Local area. Or perhaps your area's planning highlighted a business opportunity for people from the area to start a small gardening enterprise with the help of a small business

loan. This business could provide jobs while also creating positive environmental changes, too.

The partnership's responsibility will be to set the rules for how these grants and loans are distributed and select local support organisation(s) (see below for further information) to administer the distribution of funding on its behalf.

- **Assess and report impact.** The partnership will need to know how the people and projects funded through Big Local are making a difference, achieving the changes set out in the Big Local plan, and moving the area closer toward the shared vision. The partnership will need to know if the funded projects are performing and whether the activities are delivering good results. The partnership will need to inform the Big Local team centrally about progress, key activities, accomplishments and how much funding has been distributed.
- **Review annually.** Both the membership of the partnership and the Big Local plan will be reviewed annually. The review process will make sure there is open, critical reflection on how the partnership is working to achieve the results in the plan and the shared vision. This process will need to involve people from the area, too. Adjustments will make sure the plan remains relevant and continues to address the area's priorities.

How does the partnership work?

The partnership needs to work in a way that keeps people who live in the area at the centre of decision making and Big Local activities. People locally must be meaningfully involved and their views and aspirations must inform the choices the partnership makes.

To fulfil these responsibilities the partnership will:

- Engage with a diverse range of people, in a thoughtful, continuous and inclusive way. This should enable people in your local area to influence the direction and implementation of the Big Local plan and contribute their knowledge, skills and interests to it.
- Make a particular effort to develop networks with groups and communities whose ideas and thoughts may not be reflected in the partnership at that point in time.
- Promote Big Local activities, the Big Local plan and the funding available to implement it to people locally and ensure that other stakeholders are updated about Big Local.
- Make links with many different individuals, groups and organisations in your area. This could include voluntary, community and social enterprise sector organisations, councillors and MPs, public and private organisations and businesses operating in or near your area to identify opportunities and build links where funding, expertise, joint working and/or support can be provided to the benefit of the local area.

- Adopt a code of conduct for partnership members that expands on these responsibilities and describes specifically the expectations for members and their behaviour of your partnership.

There are many different ways of working to support these objectives. Many areas are working out how the partnership can best work in their areas. Some have created different 'advisory' groups or 'networks' which work together with the emerging partnership. We have provided a few examples below to show how areas are developing ideas which keep the partnership as a 'hub' which connects with many different groups and networks throughout the area.

Each of these examples shows a way of working that makes sure the partnership is not an isolated group, but is open, transparent and focused on connecting with the range of people in the area in many different ways. These examples offer a great deal of flexibility in design so that the partnership can grow and change over time.

Examples of structures to connect the partnership to groups, networks and other stakeholders:

- Partnership working together with a supporting 'consultative group'. Members of the 'consultative group' support and sometimes mentor the partnership members. The partnership may choose to have large, regular, well-facilitated open conversations with the consultative group to review Big Local progress and refresh plans. The consultative group might be open to fresh stakeholders and new partners. The partnership meets the requirements set out in this document, and may work closely with the 'consultative' group, feeding their views into any decision making.

Big Local 'steering group'. In this example, the local area sees the 'partnership' as a large group of people from the area and others from local organisations and businesses. This large group ensures that anyone who wants to participate in the 'partnership' can do so. Because it can be more challenging to make decisions in a large group, there is a smaller 'steering group' which has the responsibility of making specific decisions and meeting the requirements described within this document. In this case, what's described in this document and required by Big Local is provided by the 'steering group'.

- Big Local 'governing hub' and 'network of partners'. The governing hub is responsible for the requirements set out in this document. This group – the governing hub – is made up primarily of residents of the local area. It is surrounded by a less formal 'network of partners' which includes people from different local community groups, organisations and businesses. These organisations are likely to have a direct role in delivering Big Local, so by including them in the network of partners it helps to ensure

an open and inclusive way of working. Over time membership of the 'governing hub' might change and other people from the network of partners might become members, perhaps by election. The governing hub would also work to expand links beyond the network, building many different relationships in the local area so that in the long term the local area has strengthened these important connections.

What makes an effective Big Local partnership?

An effective partnership is key to the success of Big Local. Effective partnerships will be based on a shared vision so that they can overcome difficulties and build relationships for long term success.

Effective partnerships have:

- A clear sense of purpose expressed through your area's shared vision and Big Local plan.
- An effective chair who is respected by your partnership's membership.
- Good working relationships and trust between members, even if you disagree on some issues.
- Inclusion of different types of people, communities or groups that reflect the diversity of individuals in your area.
- An acceptance that there will be conflict and disagreements and a commitment to address these in a constructive way.
- Regular reflection on achievements made and learning lessons for the future.
- Visibility, good communication, openness and transparency.
- A regular membership review to ensure the partnership remains vibrant and attractive to new members, particularly to those that live in the local area.
- Methods in place to regularly inform the range of people and organisations in your area what Big Local is doing and also ask for feedback to make sure the area's views are reflected.

All Big Local partnerships will be supported to operate in an effective way and below we explain some of the ways partnerships will receive support.

Does the Big Local partnership 'hold' our £1 million?

The partnership makes overall decisions about how to spend the allocation, but it does not actually 'hold' or distribute the money. The Big Local Trust will hold each of the area's £1 million and will invest it on behalf of the areas until it is needed. This will maximise the potential return on the investment so that, for example, interest earned can be added to your area's funds.

When you have created your Big Local plan and decided how you want to allocate funding, money will be transferred to the area via the local support organisation(s) to meet immediate needs. We anticipate this transfer will happen based on your area's Big Local plan. The local support organisation(s) will then administer and account for the distribution of funding locally, as directed by the partnership.

Local support organisation

A local support organisation is a trusted local organisation nominated and endorsed by your partnership to administer part or all of the distribution of your £1 million.

Each area might have several different local support organisations to administer funding – grants, social investments, procurement, running costs, quick wins – it will depend on the experience of the organisation(s) and how the partnership wants to allocate its funding. It can also change over time as Big Local develops in your local area.

Local support organisations will need to demonstrate they have the relevant experience and skills to deliver what your area is asking from them. For example, if your area is going to run a grants programme, then the selected local support organisation will need to have run a similar grants programme before and already have the systems and procedures in place to manage this work.

Local support organisations will contract directly with Big Local centrally. Through this contract they will assume responsibility for making sure that Big Local money is distributed accordingly to all relevant rules and guidelines and for committing to follow the strategic directions set by the partnership.

The basic key responsibilities for a local support organisation include:

- Distributing Big Local funds using the criteria determined by your partnership.
- Working with the partnership to agree processes for distributing the funding and making sure that the partnership is kept informed of decisions relating to the funds. For example, a funding panel (which could be made up of local support organisation staff and individuals from the area) could be established to give out grants; the local support organisation could chair the funding panel meetings, but a member or two from the partnership or individuals from the area might participate in the panel. These panels would be responsible for confirming grant decisions, based on a selection and assessment criteria agreed with the partnership.
- Ensuring that funding decisions and procedures meet the requirements of Big Local centrally to ensure transparency, accountability and best practices.
- Reporting, as required, to the partnership and / or Big Local centrally.

Local support organisations will have a contract with Big Local centrally. They will be able to claim up to 5% of the total amount of funds they administer to cover their costs. This will be claimed from Big Local centrally and does not come out of your area's allocated £1 million.

If your area has difficulty identifying a suitably experienced local organisation then Big Local centrally will support you to do this through helping your partnership run an open tendering process. This will assist your partnership to select a local support organisation through an open, fair and transparent process.

Alternatively, Big Local centrally can provide support to administer running costs, grants or purchase services (procurement) for your area centrally until your partnership decides otherwise.

If you want to make social investments and there is not a suitable local organisation that can do this work (probably a credit union or a community development finance institution) then Big Local centrally will be able to help you find a suitable organisation.

How and when can the Big Local partnership access our £1 million?

We know that setting up the partnership and developing a Big Local plan will take some time. Most areas are using Getting People Involved Round 1 and Round 2 grants to fund activities for getting people involved, community visioning and creating a Big Local profile. However, we also recognise that some areas may wish to access some of the £1 million to help maintain momentum developed through Getting People Involved Round 1 and 2, but before a formal Big Local plan is developed. To help areas access this, we have created the following options.

Accessing our £1 million before we develop a Big Local plan

There are two ways to access your local area's £1 million before your Big Local plan is developed.

- 1. Big Local partnership running costs.** While your partnership is working to develop the Big Local plan, it may be helpful to access what we refer to as 'running costs'. This covers minimal costs for the partnership to carry out its roles and responsibilities. This may include things like hiring a venue for planning events. Before your plan is agreed, your partnerships can spend up to £3,000 per year of your area's allocated £1 million on these costs. Partnerships can access this money directly via Big Local centrally or via a local support organisation.

After your Big Local plan is developed, these costs will be included in your annual plans and annual spending profile. Your plan will need to explain how the running costs you are allocating are proportionate and reasonable.

2. **'Quick wins'** funding. Partnerships may wish to maintain momentum for Big Local after the Getting People Involved funding has been used and before the Big Local plan is agreed. Before your plan is agreed, areas can access up to £15,000 per year for quick wins funding from your £1 million. This can be distributed in the form of grants or through buying services. Examples of this might include providing a 'community kitty' giving out small grants to groups which meet specific objectives for the area.

Accessing our £1 million after we develop our Big Local plan

Your Big Local plan will include your area's annual budget for spending any part of the £1 million. It can include things like running costs for the partnership as well as budgets for grants, social investments or procurement. A guide to the Big Local plan will be developed shortly and will provide more detail.

How do we set up the Big Local partnership?

Your area needs to set up and run the partnership in a way that best meets the outcomes and features of Big Local (described at the start of this document) and the shared vision of your area. The partnership must meet the membership and responsibility criteria outlined in this guide. When setting up the partnership we suggest areas consider the following processes:

- *Planning for involvement.* It is best to plan how your partnership will meet the membership criteria particularly how it will include residents, link to groups, businesses and organisation in the area, link to local councillors and public sector; ensure that people know how to get involved and reflect the different people who live in the area. This needs to build on the work of people participating in your Getting People Involved activities. If you have already formed a suitable partnership that meets the criteria for Big Local you will need to discuss this with your Big Local representative. The partnership members should explain how the process was open and transparent and how it involved people locally.
- *Meet the criteria and select members.* It is important that that you use clear criteria to select members so that the individuals on the partnership meet the Big Local criteria for membership. As stated earlier, membership of your partnership will develop over time as more residents who are new to this get involved.
- *Use the Big Local profile and community visions.* This information will help you ensure the partnership reflects different community interests within your area. It will ensure that potential members of your partnership understand the range of views collected from across the area.

- *Select the chair.* The chair will play a particularly important role. We envisage that members of the partnership will select their preferred candidate for chair from within the group.
- *Decide on other key roles.* Your partnership will need to establish a fair, transparent way of working. For example, you may wish to select a secretary and treasurer and outline their responsibilities to help create this way of working. (For instance a secretary may be responsible for taking notes from partnership meetings and finding ways to share these notes with people outside the partnership but living and working in the local area.)
- *Identify support and training needs.* Your partnership may benefit from support and training. It is important to set aside some time and budget to cover this training or other support. Try to ensure that the training is relevant to the work you will be undertaking. You can access support through the Big Local 'menu of support' (various local, regional and national agencies that have offered their support to Big Local areas) which we are developing or through other organisations you may identify.
- *Deciding on governance procedures.* It is important to make clear the 'ground rules' for the partnership. We suggest these cover the following and we have provided templates and examples in this guide:
 - Memorandum of understanding
 - Code of conduct
 - Declarations of interest
 - Big Local partnership values
 - Role descriptions
 - Guidance on confidential information
 - Guidance on partnership meetings

Who endorses our Big Local partnership?

Both your Big Local representative and Big Local centrally will review and endorse your partnership membership and nomination of chair. This will include reviewing and endorsing your partnership's documents, including the memorandum of understanding, or other documents which tell us how your partnership will work. Both the Big Local representatives and Big Local centrally will pay particular attention to the mix of members to identify how residents are fully involved in Big Local, and able to make their area an even better place to live and how the partnership links to other organisations, groups, councillors and the public sector.

How do we put forward our Big Local partnership for review and endorsement?

You will work with your Big Local representative as you set up your partnership so that they understand how you have established the partnership. Once you are ready to put forward your area's partnership paperwork and proposal of chair for review and endorsement, please contact your representative and send them your documents. Your representative will review this information and discuss with you any queries or concerns.

Once the representative is confident your partnership meets all of the criteria and endorses your partnership, your partnership can then request a formal endorsement from Big Locally centrally. We will review all of your partnership materials, along with the representative's endorsement, and will endorse the partnership if we are confident all criteria have been met.

Once endorsed by the representative and Big Local centrally, the 'memorandum of understanding' will be signed by both the founding members of the partnership and Big Local centrally. The memorandum will be updated and signed annually as part of the annual review process. When any changes are made to the partnership and / or during the annual review, the partnership will follow the same endorsement process.

What support will our Big Local partnership receive?

Big Local partnerships will receive a range of support and a summary is outlined below.

Big Local centrally

We have a dedicated team of staff and delivery partners providing support to each area. Our responsibilities include:

- Providing information and guidance for running and managing Big Local in an area and on the requirements of Big Local and use of the funding, including governance, financial, legal, monitoring, reporting and administration.
- Providing training and support for areas. This could include training on planning for and making social investments (loans), grants or purchasing services.
- Working with partnerships and Big Local representatives to select Big Local facilitators.
- Supporting areas to identify eligible local support organisation(s) to administer grants, social investments or procurement activities on your partnership's behalf. Or providing this support if none are identified.
- Providing opportunities for networking, learning and support with a range of different people and organisations involved in Big Local.

- Providing training and support to partnerships in designing and managing monitoring, evaluation and reporting systems.
- Learning from monitoring and evaluation data and exploring how Big Local may be influencing social, environmental and economic factors across the areas.
- Providing support to partnerships in communications and community engagement, fundraising and social investment.
- Intervening if the partnership is at risk (for example via malpractice or operating against the partnership's stated aims and objectives or against the outcomes or key principles of Big Local).

Big Local representatives and Big Local facilitators

Initially your Big Local area receives assistance from a Big Local representative. They will advise and assist your local area to move through the first few stages of the Big Local pathway. Following this, we will work with your partnership to select and appoint a facilitator who will provide advice, support and challenge for the longer term.

It is important to remember that these roles provide a limited resource as they are there to support, facilitate and challenge rather than carry out delivery tasks. We anticipate that the Big Local facilitator roles spend less time in the area than the Big Local representative.

Menu of support

Your partnership will have direct access to a central 'menu of support' – a list of organisations or people offering specific services relevant to Big Local that you can use to assist with your activities. This includes, for example, expertise in: neighbourhood planning, research and visioning, communications, community development, environmental projects and community engagement. If the type of support your area or partnership needs is not available, we can assist in sourcing it. Some of this support will be funded from Big Local centrally, and some will be for local areas to pay for from the £1 million allocation.

You can ask your representative or facilitator on advice for how to access this support or contact Big Local centrally for more information.

Appendix A: Governance document templates

Memorandum of understanding template

Agreement between [Big Local] and [Big Local area name] Big Local partnership

This agreement is made between the Community Development Foundation (on behalf of Big Local) and

_____ Name of Big Local partnership,

who are acting on behalf of _____ Name of the Big Local area.

By signing this memorandum of understanding, members of the partnership undertake to:

- Provide overall direction of Big Local to meet your area's long term vision and outcomes.
- Agree a shared vision which extends from the range of visions collected from across the area during earlier pathway stages.
- Create a Big Local plan. The plan will set out clear approaches for realising your area's shared vision. The Big Local plan will adapt over time but will set out how you plan for the £1 million to be 'spent' via grants, social investments or procuring services. The Big Local plan will include an annual spending profile, which will dictate draw down from the area's £1 million.
- Carry out the Big Local plan. The partnership will decide how to carry out the Big Local plan. The partnership will establish the criteria for distributing any part of the £1 million and will identify suitably experienced and skilled local support organisation(s) to distribute the funding.
- Assess and report impact. The partnership will need to know how the people and projects funded through Big Local are producing useful outcomes and moving the area closer toward the shared vision. This information will help the partnership explore how Big Local may have influenced social, environmental or economic changes in the area. The partnership will need to inform Big Local centrally about key activities, accomplishments and the status of funding distributed as well as impact made in the area.

- Review annually. Both the partnership and the Big Local plan will be reviewed annually. The process will ensure open, critical reflection on how the partnership is working to achieve the outcomes and the shared vision.
- Engage with a diverse range of people in your area, in a thoughtful, continuous and inclusive way and make a commitment to equal opportunities.
- Promote Big Local activities, your Big Local plan and the funding available to implement it to people locally and ensure that other stakeholders are updated about Big Local.
- Engage with voluntary, community and social enterprise sector organisations, public and private organisations operating in or near your area to identify opportunities and build links where funding, expertise, joint working and/or support can be provided to the benefit of the area.
- Adopt a code of conduct for partnership members that will expand on these responsibilities and describe specifically the expectations for your area's partnership members.
- Participate in Big Local networking and sharing learning activities, as relevant.
- Work with your area's Big Local representative and Big Local facilitator.
- Participate in the selection of your area's Big Local facilitator.
- Work within the agreed Big Local boundaries as illustrated below. Should any changes to the boundaries be deemed necessary, the partnership will seek approval with Big Local centrally prior to making any adjustments.

By signing this agreement, Big Local centrally undertakes to:

- Provide the necessary support and guidance to the partnership to fulfil their responsibilities. This will include a representative and then a facilitator to work with the partnership; communications and fundraising support; and access to specialist advice and expertise.
- Agree proportionate and reasonable running costs for the partnership to operate.
- Provide written guidance on the operation of the Big Local.
- Communicate effectively with the partnership, including responding promptly to requests for information and advice.
- Provide opportunities for training and learning to partnership members, both nationally and through advice to local areas.
- Work with the partnership to appoint local support organisation(s) that hold(s) and distribute funding on behalf of the partnership.

This agreement is effective from the date that both signatures are made and will last in the first instance for one year or until the partnership completes its annual review.

This partnership agreement can be reviewed at any time if complaints or disputes occur that raise doubts about the ability of the partnership to fulfil their responsibilities.

Signed on behalf of Big Local centrally / Community Development Foundation

_____ Name
 _____ Title
 _____ Signature
 _____ Date

Signed on behalf of the Big Local partnership

_____ Name of chair
 _____ Signature
 _____ Date

The membership of the partnership at the time of agreeing this memorandum of understanding is listed below.

| Name (including chair) | Status (resident, worker, councillor, other) | Organisation name and role/title, if individual works in the Big Local area |
|-------------------------------|---|--|
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Agreed boundaries of Big Local area:

[insert the Big Local area map, created and approved by the Big Lottery Fund]

Big Local values example

These are the Big Local central values. They align with the vision, mission and objectives of our work. Big Local partnerships should discuss and determine if they would like to amend or add additional values or ways of working for their Big Local area. Your partnership should agree values and attach them to the memorandum of understanding.

1. We are committed to service quality and excellence.
2. We are committed to the principles of community development.
 - We help people do what they can for themselves and their communities.
 - We know that communities which face problems contain the people who will create the solutions.
 - We acknowledge and seek to overcome all forms of discrimination and prejudice so that everyone can participate in, contribute to and benefit from Big Local on an equal basis.
 - Our interventions are enabling and empowering, helping communities to mobilise their own resources and manage their own situations.
 - Our approach is collaborative, working with voluntary sector practitioners and other key stakeholders to build practical solutions to real problems.
3. We are empowered and accountable.
4. We actively share knowledge and skills.
 - We act with integrity and openness, and encourage learning, cooperation and understanding.
5. We practice corporate social responsibility.
 - We champion social and environmental justice for present and future generations.
6. We ensure equality and promote diversity.
 - We remove barriers that prevent people from participating in Big Local.
 - We value diversity and respect others for their contribution, whatever their background, ethnicity or beliefs.

Code of conduct example

The purpose of the code of conduct is to ensure that all members of the partnership operate the highest standard of integrity at all times. Each partnership should discuss and agree an appropriate code of conduct for their partnership.

Big Local values - As a member of the partnership I agree to abide by our area's Big Local values.

Additionally, I agree that:

- Everything the partnership does will be able to stand the test of scrutiny by the public, charity regulators, community members, stakeholders, funders and the courts.
- Integrity, respect and honesty will be the hallmarks of all conduct when dealing with others within the partnership and equally when dealing with individuals and institutions outside it.
- The partnership will strive to maintain an atmosphere of openness throughout the community to promote confidence of the public, stakeholders, Big Local centrally, the Big Lottery Fund, charity regulators and government.

In particular:

- I will not break the law, go against charity regulations or act in disregard of partnership policies.
- I will abide by our local Big Local policies.
- I will always strive to act in the best interests of Big Local.
- I will declare any conflict of interest or of loyalty, or any circumstance that might be viewed by others as such, as soon as it arises.
- When I am speaking as a member of the partnership, my comments will reflect the work of the partnership even when these do not agree with my personal views. When speaking as a private individual I will strive to uphold the reputation of the partnership and those who work in it.
- I will not personally gain materially or financially from my role as a member, nor will I permit others to do so as a result of my actions or negligence.
- I will strive to read all documents and attend all meetings, giving apologies ahead of time to the Chair if unable to attend.
- I will engage in debate and voting in meetings according to procedure, maintaining a respectful attitude toward the opinions of others while making my voice heard. I will accept a majority committee vote on an issue as decisive and final.
- I will maintain confidentiality (where this has been agreed in the partnership's guidance on confidentiality) about what goes on in the meeting unless authorised by the Chair or committee to speak of it.

- I will participate in induction, training and development activities for members.
- I understand that substantial breach of any part of this code may result in my removal as a member.
- Should I resign as a member I will inform the Chair in writing, stating my reasons for resigning. Additionally, I will participate in an exit interview.

Role descriptions example

The partnership needs to provide members with a short description of their role to help them understand what needs to be done. The information can be created from the information in this document. The partnership can review and amend this from time to time to ensure it stays relevant. Each partnership needs to discuss and agree appropriate role descriptions to guide their Big Local activities.

If residents, the expectations are that members:

- provide information and advice about day-to-day quality of life in the area
- actively encourage people in the area to play their part in supporting Big Local and its activities
- are committed to equal opportunities and inclusion
- ensure that local concerns are addressed and that solutions have local support
- provide regular feedback and a clear steer on priorities based on local knowledge.

If non-residents, the expectations are that members:

- provide relevant advice, knowledge and expertise to Big Local
- actively review and be an advocate for Big Local with a view to gaining additional impact from the activities of their parent organisation or other bodies
- are committed to equal opportunities and inclusion
- report as appropriate, progress from within their organisation which illustrates evidence of changing practice and policy that is or is likely to benefit Big Local.

The role of the Chair is to:

- chair the partnership meetings ensuring that members are encouraged to share their ideas and are able to reach agreement on how the work is carried out in an effective way in line with Big Local outcomes and principles
- have the casting vote at meetings in the event of a vote being tied
- take part in resolving governance or conflict issues in line with the relevant agreements
- be committed to equal opportunities and inclusion
- maintain an overview of Big Local, ensure progress is made according to the Big Local plan and ensure Big Local remains on track.

Declaration of interest and loyalty example

In line with the code of conduct, members of the partnership will need to declare any conflicts of interest and loyalty. Each partnership should discuss and agree an appropriate conflict of interest and loyalty procedure to guide their Big Local activities. The guidance below will help you agree a procedure.

Where a member has a clear private or personal interest in a matter under consideration, they must both declare that interest and, if necessary, withdraw from the meeting. The interest need not be of a purely financial nature but could include membership of a club or organisation connected with the matter under discussion. Interests can be positive or negative especially where a competitive element is introduced. For example, a member may wish to support a particular course of action because it impacts more favourably on an organisation they are a member of, or impacts favourably on their friends/relatives.

Big Local partnerships need to work out when a member has to withdraw from the meeting because we recognise that most people in the partnership will know the people and organisations under discussion.

If in doubt, an individual should avoid being in any position where suspicion could be raised for any appearance of improper conduct - if in doubt, the individual should declare the interest and seek guidance for future meetings.

Where an individual has declared an interest a statement should appear in the notes of the meeting. For example:

XXX declared a financial/non-financial interest in the above item and withdrew from the meeting, taking no part in the discussion or decision.

or

XXX declared non-financial interest in the above item and remained in the room during its consideration, but took no part in the discussion or decision.

Guidance on confidential information example

Your involvement in the partnership may mean that you have information that has not yet been made public or is confidential. Each partnership should discuss and agree an appropriate procedure / confidentiality agreement for dealing with confidential information. The information below will help you do this.

You should never disclose or use confidential information for the personal advantage of yourself or of anyone known to you, or to the disadvantage or discredit of the partnership.

Members are expected to adhere to any Big Local confidentiality agreement at all times and may be asked to adhere to a specific 'embargo'. (An embargo is a request not to share information until a certain point in time.) Wherever possible the timescale and the reasons for such an embargo will be defined at the time the embargo is put in place.

Examples of such instances where a confidentiality embargo may be used are:

- details of individuals or organisations, who have submitted funding applications
- details contained within individual applications prior to a decision being taken
- information not in the public domain
- draft plans or proposals not yet approved.

A short confidentiality embargo may be imposed after any partnership meeting to ensure time to allow information to be distributed within the area to specific organisations or individuals.

Where an issue is known to be potentially sensitive or likely to be confidential members will be made aware of the details of any embargo in advance.

In the event of a confidentiality agreement being breached by an individual, group, or organisation, the partnership will take appropriate action.

Guidelines for partnership meetings

The partnership will need to agree the frequency and style of meetings.

For example:

- How formal are the meetings?
- How public are the meetings – who can attend as observers?
- How is the agenda created?
- What paperwork is provided – in advance or at the meeting?
- What items are confidential – and until when?
- Who takes the notes and who receives copies of the notes?
- Who can call meetings?
- How many members need to attend in order to make a decision (what is a quorum?)
- How are decisions made (consensus basis, majority vote of members, community votes etc)?
- How are issues, conflicts and disagreements resolved?
- Where are conflicts of interests recorded?
- What sub-groups are there and why?
- How many meetings can a member miss before they are asked to resign?

There might be other things to discuss and agree too. In the spirit of Big Local, transparency is important, so areas need to consider how the partnership operates and wherever possible be open and transparent in all activities.