



Federation of Northumberland Development Trusts

# **Strategy and Implementation Plan**

## **2011 – 2014**

28<sup>th</sup> March 2011

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# 1 Executive Summary

Development trusts (DT's) are transforming communities across Northumberland. Community owned and responsive to their local communities, DT's develop and deliver key services with the aim of ensuring that the towns and villages of Northumberland continue to be quality places where people want to live, work and bring up children.

The Federation of Northumberland Development Trusts (FoNDT) is a membership organisation established in 2002 which builds and supports the DT movement in Northumberland. Many DT's in Northumberland are seen as national exemplars. FoNDT has demonstrated how the effectiveness of community based regeneration can be enhanced when DT's work closely together.

Since 2002, the achievements of FoNDT have been impressive:

- It has established a structure for members to share good practice and work together.
- It works closely with a range of stakeholders.
- It has explored issues around increasing the financial sustainability of its members.
- It has been recognised nationally as being at the forefront of work on affordable housing.
- It has dedicated staff and an active Executive working closely with its members to deliver its plans.

Steve Wyler, Director of the Development Trusts Association, visited Northumberland in 2007 and said "It is remarkable to see how much has been achieved in such a short time by the Federation. Across the County a high level of skills exchange and co-operation is enjoyed among development trusts and other community enterprises, many of whom are small, rural, and potentially isolated. Efforts to promote asset development and affordable housing have yielded tangible results, and income generation has been built up through successful community-owned social enterprises. We would love to see the work of FoNDT replicated in other parts of the country."

Strategically it was recognised in April 2010 that this is a time of change and FoNDT became an independent constituted organisation which was a recognised player in Northumberland representing membership providing one voice for stakeholders to deal with and which could respond to the current economic and political challenges that DT's would face going forward. At national level, the Government is promoting asset acquisition and encouraging third sector organisations to become involved in public sector contracting. At the same time, local government reorganisation in Northumberland and the pressure for efficiency savings in local government means there is continued widespread uncertainty. The unitary authority offers both opportunities and threats for DT's. The Regional Development Agency will no longer exist from April 2012 and the impact of the Big Society Agenda on the Third Sector is currently unknown as is the introduction of Local Enterprise Partnerships (LEPS). FoNDT and its members continue to face uncertain times. DT's are part of the addressing the balance between repositioning the economy from Public sector to private sector. Dependency to independency of financial sustainability - stronger together.

This strategic plan has been developed by FoNDT members and FoNDT Executive through strategy days, consultation events and meetings and the key priorities for FoNDT over the next three years are:

1. Further development of the representation and advocacy function – including work to raise the profile of DT's in Northumberland and to identify the social value of their work and their contribution to the local economy
2. Developing and supporting joint contracting by member trusts
3. Supporting the development of community based affordable housing
4. Securing resources to ensure that FoNDT can continue to support community based regeneration in Northumberland.
5. Support the membership in becoming sustainable

Alongside this work, FoNDT will continue to provide regular services around information provision, opportunities for networking and liaison with members and continue to work in partnership with key stakeholders across all sectors.

FoNDT members have an impressive track record in working with their local communities to support local businesses and enhance the lives of local people. Whilst delivering these economic, social and environmental benefits to their communities, DT's in Northumberland have also worked to become more financially sustainable.

Since 2002 the DT's of Northumberland have increased turnover, earned income and their asset base to the collective level of a substantial business operating within Northumberland.

In 2010 Membership of FoNDT has increased to 24 Development Trusts spread geographically across the whole of the county, with the following key statistics:

- 24 Development Trusts
- £ 10m Asset Base
- £ 8m Fixed Assets
- £ 9m External Funding into Northumberland
- £ 5m Combined Turnover
- Employ 121 Staff
- Engage 500+ Volunteers

DT's have a crucial role to play in meeting the needs and aspirations of the people of Northumberland. This plan sets out the vision and strategy for FoNDT over the next three years and identifies how stakeholders and funders can work with development trusts in Northumberland to achieve our shared vision.

## **2 Introduction**

The Federation of Northumberland Development Trusts (FoNDT) is an association of members that seeks to build and support the development trust movement in Northumberland.

DT's are community based regeneration organisations which use self-help, trading for social purpose and ownership of buildings and land to bring about long-term social, economic and environmental benefits in their communities. DT's are value driven organisations which create wealth in communities and keep it there.

This plan sets out the vision and strategy of FoNDT for the next three years. It is being written in the context of the changing and challenging political and economic environment in Northumberland with the aim of eliciting support and investment from a range of stakeholders and funders.

### **2.1 Vision**

FoNDT aims to build the development trust movement in Northumberland as an exemplar of sustainable county wide community based economic regeneration with collaborative working its heart.

FoNDT's vision is to assist members to create a self sustaining enterprising culture which enables local communities to be resilient and have the ability to control and shape their own future.

### **2.2 Mission**

DT's are established to promote, maintain, improve, encourage and advance the prosperity and social welfare of the inhabitants of their community.

The mission of FoNDT is to assist our members to be at the centre of the community, providing and encouraging practical, deliverable and economically viable projects harnessing the energy within Communities that make a significant contribution to the improvement of the quality of life of local people and have a sustainable future.

By developing enterprising and self reliant communities across Northumberland through the network of DT's FoNDT will be recognised as a credible partner in measuring the development of Northumberland.

### **2.3 Aims and Objectives**

The key objectives for this strategic plan are to support DT's across the county by:

- further development of the representation and advocacy function
- developing and supporting joint contracting by member trusts
- supporting the development of community based affordable housing

- securing resources to ensure that FoNDT can continue to support community based regeneration in Northumberland.

These priorities can be set in the context of FoNDT's long term aims which are:

- supporting members to deliver effective community led regeneration
- supporting members to become more financially sustainable through acquiring property assets, contracting and community enterprise
- supporting members to work together effectively
- promoting the work of members to influence regional and national policy and secure investment for members
- linking policy and infrastructure in Northumberland with the Development Trusts Association (DTA) at regional and national level and with other regional initiatives
- sharing best practice amongst members
- supporting the formation of new development trusts
- being an effective and accountable organisation
- securing funding to ensure that FoNDT can continue its development work with trusts across Northumberland
- utilising the skill base across the membership to support and develop individual DT's
- Develop continuous improvement ethos across federation members.

## **2.4 Social Impact**

The members of FoNDT have a huge, positive social impact on their communities. FoNDT supports its members to be more effective in delivering those social impacts and to be more financially sustainable – so that those positive impacts can continue in the longer term. Therefore even though FoNDT does not have a direct social impact, its effectiveness can be demonstrated in the work of its members and their communities.

Through the economic and political challenges over the next three years this area is most at risk in the DT portfolio as more focus is on social enterprise development which is necessary but DT's must not lose their social impact responsibilities.

## **2.5 Keys to Success**

To enable FoNDT to continue its success story there is a need for the member

DT's to embrace the challenge of the change agenda which is being driven through key issues as those stated below:

- Global Recession
- Public Sector reform
- Reduced Funding
- Move from Grants to Income generation through Social Enterprise

FoNDT supports its members to make a real difference to local communities in Northumberland and aims to support the delivery of sustainable Vibrant & Enterprising Communities.

The keys to the success of FoNDT include:

- continuing to meet the needs of FoNDT members for representation, support, co-ordination and development
- increasing the financial sustainability of members by increasing their ability to contract with the statutory sector and other organisations to deliver services
- increasing the financial sustainability of members by increasing their opportunities to acquire assets and to trade for community benefit
- increasing publicity to develop awareness of FoNDT as a representative body for effective delivery organisations which involve and empower their local communities
- being viewed as a key partner by public and private sector organisations including being closely involved in future proposals for the development of public and other services in Northumberland
- being known and respected across the area as a strong representative organisation.

## **2.6 Policy Context**

A key element of the agenda of FoNDT is to work with its members to understand the national, regional and local policy context. This informs representation work and is crucial for identifying opportunities and threats for development trusts. The main elements of current policy are set out briefly below.

### ***Nationally***

- Political Reform
  - Coalition Government

- Regional Development Agency and GONE due to close in 2011/12
- Northumberland Unitary / Demise of Districts
- The Big Society Agenda
  - Community Empowerment
  - Philanthropic action
- The creation of Local Enterprise Partnerships (LEPs)
- Government pressure on statutory bodies for efficiency savings and the impact of this on commissioning – see for example the Gershon report.

### ***Regionally***

- Regional Efficiency and Improvement Partnership is pursuing the Government agenda of efficiency savings while, at the same time, following up on work by the North East Centre for Excellence around increasing the opportunities for SMEs and third sector organisations to contract to deliver services.
- Regional support agencies closing
- Regional Growth Fund (£1 Billion fund to reduce impact of Public Sector cutbacks )
- No Rural LEP – effect on the Rural Agenda unknown.

### ***Northumberland***

- Local government reorganisation is impacting on all aspects of life in Northumberland and this will continue to affect the work of DT's.
- £10 million reduction in funding re NCC re 2010-2011. with a further 25 % reduction by 2014/2015.

FoNDT is well represented on county-wide bodies. This has enabled FoNDT to highlight issues from a community point of view and to demonstrate its ability to provide the local solutions for policy makers and gain credibility as a proactive deliverer.

FoNDT embraces the “Localism” agenda and “Community led planning”

## **2.7 Highlights and History**

The DT movement has been well developed in Northumberland for a number of years which is indeed one of the strongest areas in the country for the growth of DT's. There are currently 24 FoNDT members.

Initial support for the establishment of DT's came from NCC and the Community Council for Northumberland. The Northumberland Strategic Partnership (NSP) has been a key supporter of DT's and FoNDT, specifically providing strategic, financial and practical backing for the trusts. The Market Town Initiative provided further impetus to the movement.

FoNDT was set up in 2002 and at its first conference in 2002 established the key aims of:



- representation on the Board of the NSP
- lobbying the NSP and other agencies around issues of revenue funding
- exploring opportunities for DT's to share services, e.g. accounting and human resources
- sharing good practice.

From 2002-2006, the main achievements of FONDT were:

- establishing itself as an unincorporated organisation with clear processes for ensuring democracy and accountability
- adopting the DTA definition of a development trust
- sharing information and good practice around sustainability and community enterprise.

During that time, Pulse Regeneration explored opportunities for increased financial sustainability through community enterprise for development trusts in Northumberland. Pulse reported that there were clear enterprise opportunities around food, the environment (e.g. recycling), tourism and asset based development. Pulse recommended that FoNDT employ a dedicated member of staff to exploit the opportunities.

In 2005-6, MC2 carried out a piece of work with market town partnerships in Northumberland to help them to develop business plans and enterprise opportunities and this too identified the need for staff support for FoNDT as a key principle.

### **2006-08**

In 2006, FoNDT developed its first strategic plan setting clear targets around representation, sharing good practice, encouragement of joint working and increasing the financial sustainability of members. Funding was raised to put the plan into action with the following achievements:

- FoNDT Development Officer appointed.
- Two successful conferences.
- Development of well received publicity materials.
- Increased joint working between trusts.
- Development and refinement of representation and accountability.
- Support for members to increase assets and develop earned income streams.

As well as delivering improvement for their local communities, DT's have also increased their financial sustainability. Development trusts in Northumberland had a turnover of £4.7 million in 2006-7 – of that figure £938k was earned income. (These figures and those following are based on analysis of the audited accounts of 15 trusts in Northumberland which are full members of the Development Trusts Association and lodge their report and accounts with the Charity Commission on an annual basis.)

In 2004, the average turnover of a development trust in Northumberland was £173,627 – by 2007 it had grown to £311,192. Within those figures, earned

income has grown by 223%, from an average of under £20,000 in 2004 to an average of over £60,000 in 2007.

Since 2004, the total value of assets held by trusts in Northumberland has increased to £6.6 million. Total assets have grown by 68% from an average of £264,349 in 2004 to an average of £443,144 in 2007.

DT's in Northumberland gain resources through grants, trading, contracting and assets. The figures above demonstrate how effective development trusts in Northumberland have been in increasing earned income, increasing assets and so diversifying their sources of income. Grant income is still needed – particularly to support key local services – but these figures demonstrate that trusts have been pro-active in building their financial sustainability.

### **Affordable Housing**

Just after receipt of the original Pulse regeneration report, FoNDT was offered the opportunity to undertake some dedicated work on affordable rural housing. This was through grant funding from defra which was matched by One NorthEast. As members of FoNDT had been at the forefront of lobbying in Northumberland and regionally on this issue, FoNDT welcomed the opportunity.

Affordable housing is a key issue for rural areas in Northumberland. If villages and market towns are to thrive, local people in local employment must be able to live there. There has been a huge amount of interest in this issue from Government over the last few years evident in the Housing and Regeneration Act and the Mathew Taylor Review – with increasing support for Community Land Trusts and other models which put the local community at the heart of the development of affordable housing.

Over the last few years, Northumberland development trusts have been at the forefront of developments. Holy Island of Lindisfarne Community Development Trust was one of the first in the country to address the affordable housing issue directly, building five houses for local families meant that the primary school on the island could re-open.



Glendale Gateway Trust highlighted the issues locally, regionally and nationally as it explored options for developing affordable housing both as a local service and an income-earning asset for the community. Progress has not just been in rural areas. Ashington Community Development Trust now owns and manages six houses that have been renovated and are let out to local people on affordable rents.



At Glendale Trust the HCA has met and written to the trust in relation to exploring the potential of delivering low cost housing– this is a significant turning point with national implications and has come about from the pioneering work done by Holy Island, GGT, Reaching Communities, Regeneration and Culture and Heritage Enterprise.

## Delivery and Credibility

One of the key attributes of DT's is their ability to attract external funding for community projects through their charitable status and over £10m has been brought to Northumberland over the past three years.

Individual DT's have been recognised through a range of external awards from Market Town Regional award winners, Holy Island winning the 2010 HCA Rural Housing Awards and both Glendale and Seahouses attended a royal event at Windsor Castle recently to celebrate rural communities in the UK. It is not the recognition that is important but the delivery of projects that would not have happened without DT's – although the recognition supports the credibility of DT's and FoNDT.

With the current economic and political challenges DT's are now at the forefront to work with NCC to save and develop services such as libraries, health care and social housing – the key message is that DT's are capable of rising to this challenge but are not a cheap alternative. The range and diversity of professional skills across the membership would challenge a number of other external organisations and their close links to communities could be a key attribute in the delivery agenda for Northumberland going forward.

## 2.8 Partnerships



Partnership working is at the core of all that FoNDT seeks to achieve. By working hand in hand with a range of partners we look to deliver the best possible outcomes on behalf of our members and their communities.

In order to achieve these outcomes we work with a variety of individuals and agencies including:

- Member organisations
- Development Trusts Association
- Northumberland Strategic Partnership
- Northumberland County Council
- Town and Parish Councils
- Community Action Northumberland
- Social Enterprise Northumberland
- One North East / GONE
- Range of Funding Bodies.

A crucial element of the work of FoNDT is to build relationships with stakeholders. The aim is that stakeholders recognise the work of DT's across Northumberland. FoNDT is an effective means by which stakeholders can interact with trusts and become a focal point of contact.

The target audience for this work will be informed by the wider strategy of FoNDT. Initially, the target audience for this work will be:

- new unitary authority officers and elected members
- Procurers of services primarily in the public sector including the Care Trust and local government.

During 2010 FoNDT have been interfacing directly with the CEO of Northumberland County Council (NCC) to explore opportunities of working together for the benefit of the county and three key areas were identified re ongoing and potential engagement & delivery of NCC targets over the next two years are considered to be:

1. Asset Transfer and Development
2. Regeneration and Renewables
3. Procurement of Services

To take this forward a priority for 2011 for the FoNDT Executive will be to:

- instigate meetings and links with key unitary personnel including both officers and elected members
- Organise meetings and links with key personnel in other statutory organisations.

FoNDT membership is open to all established and emerging DT's situated in Northumberland. At the present time there are 24 Members of FoNDT. Most are members of the DTA, the national membership body for development trusts. FoNDT has adopted the DTA definition of a development trust.

FoNDT assists all members, regardless of status, and encourages all to be active and to develop themselves. FoNDT has an active membership, with trusts attending meetings, supporting joint projects and representing FoNDT on a range of county-wide organisations. FoNDT is very much a two way street between the members and the FoNDT Executive.

FoNDT also actively supports those wishing to investigate what establishing a DT could mean to their community and assists in the development of their organisation.

FoNDT are keen to engage in a proactive way with NCC and other partners to support the ongoing development of Northumberland in what are challenging times and by working positively and creatively a sustainable future can be achieved.

Key areas of ongoing partnership working to be developed include the following:

#### 1. Finance

- Loans at preferential rates e.g. renewable with high capital finance requirement
- Social Impact bonds
- Recognition of the multiplier effect of letting contracts locally – LM3

## 2. Information

- Comprehensive list of potential assets available for asset transfer (Inc ONE properties/ land)
- establishing regular meetings with FoNDT Executive to receive/ disseminate information

## 3. Enabling

- Aggregate less than £50k contracts to allow VCS to tender
- Procurement process takes SROI into account thereby making VCS more attractive to commissioners
- Further development of rural employability project
- promote and enable development of NCC renewables opportunities at community level
- Consideration of VCS benefit within planning process
- Development of partnership development models in relation to regeneration or asset transfer projects
- Use of FoNDT as a catalyst to break down cross agency and cross departmental 'silo' mentality working

FoNDT has demonstrated through its members actions that the following terms of engagement with partners can be delivered:

- Forward Looking - NOT FOCUSING ON PAST ISSUES
- Recognise the issues and Challenges at national, regional and local level
- Non Political
- Recognise the Strategic priorities of Northumberland

## 3. The Organisation

FoNDT was formed originally in 2002 to support its members to excel in delivering physical regeneration and community engagement projects and activities. FoNDT provides high quality services for its members aimed at enhancing the ability of members to serve their local communities.

### 3.1 Legal Structure/Ownership

Following the decision to move away from being hosted by the Development Trust Association, FoNDT became a constituted body in April 2010 and is now a Company Limited by guarantee. This form of organisation is seen as best to meet the needs and aspirations of members moving forward. This new legal structure encapsulates FoNDT's function as a representative and networking body which is open and accessible to all its members. FoNDT continues to be an ambitious organisation that seeks to further develop and trade. It will do this in collaboration rather in competition with its members

FoNDT will identify trading opportunities both for individual Trusts and partnerships of Trusts and will continue to pursue them to the benefit of its members ensuring

that a suitable effective organisation is in place in order to maximise any future opportunities, together with ensuring the quality of the services provided.

### 3.2 Organisational Structure

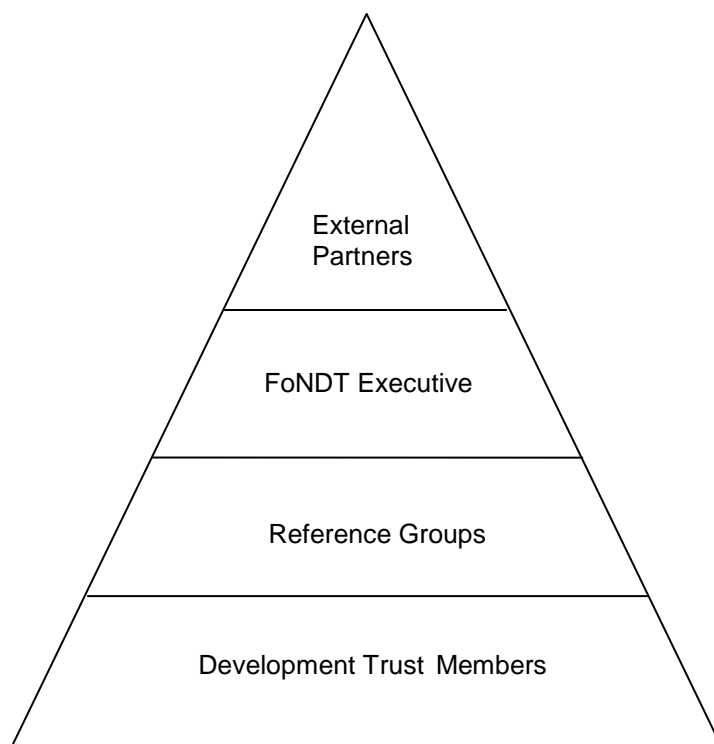
All members are invited to attend and participate in our regular network meetings which are held bi-monthly and recently have been open to officers and Board members and these meetings are well supported.

The Annual General Meeting, which is open to all members, elects a five person Executive Committee and a Chair is elected, historically a Vice-Chair and Treasurer have been elected but the current Executive are sharing the delivery of these functions.

The Executive is responsible for the overall direction of FoNDT and how its members are involved and consulted, the Executive meet bi-monthly and for key one off issues.

There are two dedicated steering groups:

- Reference Group – which supports and directs the strategic priorities of FoNDT Membership and includes the Executive plus a representative from Social Enterprise Northumberland.
- Affordable Housing Steering Group – which supports the work of the DTA Affordable Housing Officer. Membership is drawn from the FoNDT Executive Committee and representatives of the NSP, housing authorities and Homes and Communities Agency (HCA).



### 3.3 Membership

FoNDT membership is open to all established and emerging development trusts situated in Northumberland. At the present time there are 24 Members of FoNDT. Most are members of the Development Trusts Association, the national membership body for DT's. FoNDT has adopted the DTA definition of a development trust.

FoNDT assists all members, regardless of status, and encourages all to be active and to develop themselves. FoNDT has an active membership, with trusts attending meetings, supporting joint projects and representing FoNDT on a range of county-wide organisations.

FoNDT also actively supports those wishing to investigate what establishing a development trust could mean to their community and assists in the development of their organisation.

Geographically there is tremendous geographical coverage of Northumberland by DT's as can be seen in the map below. FoNDT has also discussed potential new trusts in recent months and there are new opportunities to increase trust presence in the south east of the County and recently have see a new Trust in Bedlingtonshire emerge with the support of FoNDT.

There is great diversity in the size, make up and activities undertaken by individual DT's but collectively it amounts to a major employer in Northumberland with major influence at local community level. Currently there are three classifications for FoNDT members:

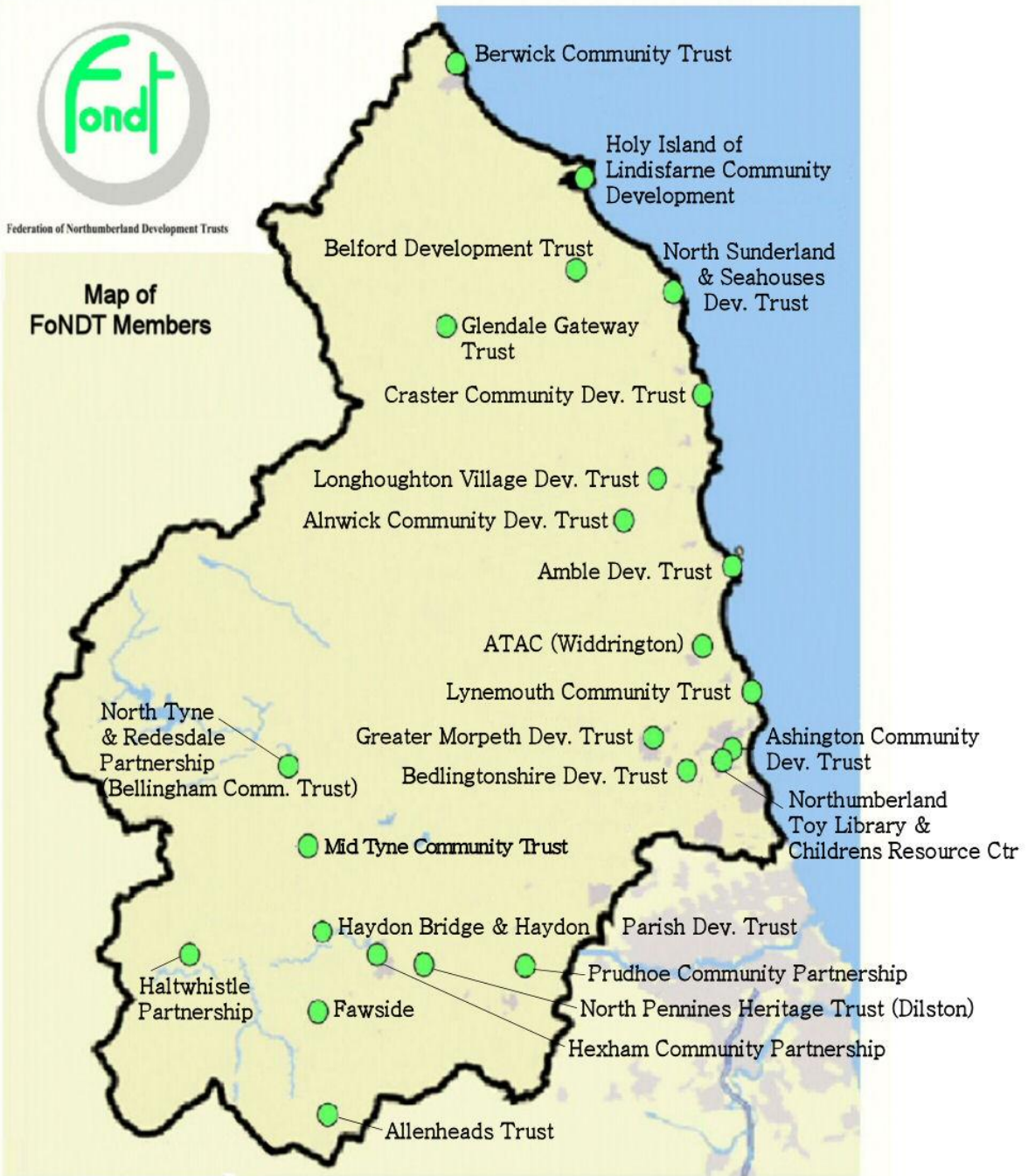
- Established – DT's with a paid workforce in existence for 5 years +
- Emerging – DT's with a mix of paid / volunteer officers
- Volunteer – DT's with no paid support and tend to be smaller more rural locations

As a result of the diversity it is critical members support Executive in promoting FoNDT in responsive manner and be prepared to share information to support the DT's and also share best practice going forward.



Federation of Northumberland Development Trusts

### Map of FoNDT Members





### 3.4 Management Team

The Executive Committee outlined above provides strategic management of FoNDT. The current Executive is made up of the following representatives:



*From left to right:*

David Lodge (Chair)  
Yvonne Probert  
Tom Johnston  
Andrew Gooding  
Russell Sandbach

Greater Morpeth Development Trust  
Prudhoe Community Trust  
Glendale Gateway Community Trust  
Lynemouth Trust  
Berwick Community Trust

### 3.5 Staff

#### Administrative Support

From November 2010 Administrative Support re FoNDT is being provided through Greater Morpeth Development Trust by Caroline Clough following the Development Officer leaving the Post in October 2010 and the Executive picking up the responsibilities until the end of March 2011 when the funding for the role was due to expire.

Ongoing administrative support will be required to effectively manage FoNDT and support the Executive and members and resource will be sourced to enable this to continue.

### 3.6 Volunteers

All of the members of FoNDT are effectively volunteers when it comes to the support and work that they undertake for the organisation. FoNDT benefits hugely from their skills, experience and enthusiasm for example professional skills or expertise, personal interests and strong community ethic.

In particular, the volunteer support for FoNDT is encompassed by all of the Project Officers of the member trusts, together with trustees of those Trusts without a paid officer. Many of the officers give a proportion of their time to the development of FoNDT and getting its name more widely known in the County, along with the achievements, experience and abilities of individual members to deliver valuable projects with huge social impacts and benefits.

In 2010 the members of FoNDT engaged with over 500 volunteers across Northumberland through the activities they undertake and this is seen as a critical

area going forward to be developed to counter balance the reduction in resources and the potential of a greater pool of volunteers becoming available through the economic challenges faced in the county.

## **3.7 Operations**

### **3.7.1 Policies and Procedures**

FoNDT is committed to ensuring that its work is managed to the highest standards. Greater Morpeth Development Trust who is currently hosting FoNDT has a full set of policies and procedures in place to ensure compliance with all legislation such as Health & Safety, Disability Discrimination, Equal Opportunities, Child Protection, Vulnerable Adults and so on.

Appendix 5 (Current schedule of Policies & Procedures being updated to standardise across all Development Trusts)

This area is important in sharing of best practice and also to enable emerging trusts to have access to a standard set of policies and procedures to help them become established.

### **3.7.2 Monitoring, Evaluation and Finance**

As a membership organisation, FoNDT is committed to monitoring and evaluating its services to ensure that it continues to meet the needs and aspirations of its members. It does this through:

- FoNDT membership meetings
- FoNDT Executive meetings
- monitoring take up of services
- evaluating conferences and training courses
- Regular liaison with stakeholders and funders.
- Northumberland County Council (Monitoring & Evaluation Framework VCS Investment Fund)

FoNDT ensures that it provides full and timely reports to funders based on the targets set when the funding was approved.

In 2010/11 funding was received from the following sources:

Northumberland County Council - for FoNDT with a further commitment for 2011/12 confirmed and subsequent years under review by NCC scrutiny along with all contributions to the VCS.

Northumberland Strategic Partnership – for the Development worker function this was a one off grant with an aim to attract external funding to continue to function beyond 2010/11.

The ongoing uncertainty of funding has resulted in the Development Officer role not to be re-appointed up to the end of March 2011 but it would be the intention of

the Executive with the support of the membership to attract funding to ensure ongoing support for FoNDT from April 2011 onwards.

## **4 Strategy**

The role of FoNDT going forward needs to be based upon its historic achievements but also what DT's can offer to tackle the current economic and political challenges for the county of Northumberland. Historically DT's have effectively delivered the following:

- Facilitate Change
- Local Credibility
- Can do attitude
- History of Delivery
- Reaction & Resilience
- Raise Community Aspirations
- Survive & Thrive in Adversity
- Strong existing community network

As previously stated the three Key Areas re ongoing and potential engagement & delivery of NCC targets over the next two years are considered to be:

1. Asset Transfer and Development
2. Regeneration and Renewables
3. Procurement of Services

In addition FoNDT will continue with:

1. further development of the representation and advocacy function
2. Developing and supporting joint contracting by member trusts, investigating barriers that exclude Third Sector Organisations from the Procurement process and actively lobbying for change.
3. Continue to be an active partner in the development of community based affordable housing in Northumberland.
4. Securing support and investment to ensure that FoNDT can continue to support community based regeneration in Northumberland.

Alongside this work, FoNDT will continue to offer its regular services around information provision, opportunities for networking, liaison with members and brokering in support for new trusts.

## **Representation and Advocacy**

DT's provide essential and valued services to the people of Northumberland. A primary function of FoNDT from its inception has been to represent development trusts within countywide structures and to a range of statutory and voluntary sector bodies – a list of those bodies is attached as Appendix 4.

This will build on current practice, which is:

- mainly members representing FoNDT – though staff undertake some representation work
- two way communication and accountability through FoNDT network meetings
- responding to consultation documents
- Regular meetings with key stakeholders.



2010 FoNDT Conference at Morpeth Town Hall

During the short term there will be a focus on developing a relationship with key officers and members involved in the single unitary authority but it is vitally important that broader links are developed that involve other potential partners and stakeholders.

FoNDT plans to enhance its representation and advocacy by:

- development and implementation of a marketing and communications strategy
- proactive networking with statutory bodies, building understanding of how development trusts can assist in meeting the strategies and priorities of a range of statutory agencies in Northumberland
- Demonstrating the value of the work of DT's in Northumberland – both the social value and the contribution to the local economy. This will be taken forward initially through a working group looking at the most appropriate tools for FoNDT members.

## Joint contracting

Development trusts are multi-purpose organisations which develop services in response to the needs and aspirations of their local communities. Issues around size, location and history of those communities affect, for example, the population, levels of deprivation and key issues for local inhabitants.

Whilst appreciating that individual development trusts are different, there are broad themes which links the kinds of services provided:



- One stop shops – providing a hub where local people can access a range of essential services that are not available through traditional routes.
- Support around employment – working with Job Centre Plus to advertise vacancies to local people.
- Support around training – working with LSC to deliver job related training courses to the community.
- Managed workspace – providing a range of offices, workshops and meeting rooms.
- Affordable housing – facilitating the development of affordable housing.
- Youth and children services – providing child care, nurseries and youth clubs.
- Support for older people – working to enhance local day care provision and support older people to have a voice through forums.
- Support for business and enterprise within the local area.
- Support for tourism – working with Northumberland Tourism to enhance tourism and retail offers.

FoNDT has identified that aspects of these work streams could provide opportunities for development trusts to contract with a range of local agencies. DT's in Northumberland have a track record in:

- delivery of local services which meet the needs and aspirations of local people

- “joining up” services in their local areas for example the Rural Employability ( REP ) and REACH projects which involve a number of Trusts coming together to deliver a service.
- knowing their local area and its people in depth
- linking in to a range of people who other services may find “hard to reach”
- delivering capital programmes on time and on budget with the support of local people.

So DT’s can provide solutions for a range of statutory organisations – including local delivery, local knowledge and effective service provision.

The unitary authority has indicated that it may be interested in contracting out some service delivery to community organisations. However it is unlikely that statutory organisations will contract individually with development trusts and other third sector organisations. So the focus of FoNDT’s work is to enable DT’s to work together to contract for and deliver these services.

As FoNDT will not deliver the services, it is inappropriate that it should hold contracts or service level agreements. Two models are most appropriate:

- a lead trust holding the contract and sub-contracting with others **or**
- Establishing a trading company around a particular geographical area – e.g. the south east, west or north of the county or around delivery of a particular service – e.g. employment and training or one stop shops. The trading company would be made up of delivery organisations.

The key point is that FoNDT will use or set up the most appropriate structure for any particular contract or service level agreement in consultation with its members and having due regard to the requirements of the statutory body offering the contract.

FoNDT will remain forward looking and not focus on past issues.

FoNDT will recognise the issues and the issues at a local regional and national level

Continue to be non-political whilst recognising the strategic priorities of Northumberland.

The focus of the work over the next three years will be the sharing of information for the benefit of the membership to improve:

- Sustainability
- Cross Fertilising
- identifying opportunities – liaison with a range of statutory agencies including knowledge of their plans and strategies, issues and problems

- identifying good practice models from other places and in other sectors which could be replicated
- building the knowledge and relationships to help trusts to work together to bid for and deliver contracts
- developing the infrastructure for consortia to bid and deliver contracts – including clarifying roles, sub-contracting and quality control.

## **Affordable Housing**

FoNDT will continue to be a partner in exploring models for the provision of community owned affordable housing. Some key aspects of the way in which FoNDT has worked on this issue are:

- feeding the lessons from practical on-the-ground support for affordable housing development into policy development
- working primarily with development trusts which have the structure, experience and competence to progress housing schemes
- working effectively with stakeholders and linking the project into wider housing and regeneration strategies within Northumberland and the North East
- highlighting and celebrating the successes in Northumberland.

Development of housing is a very long term commitment for any community. Five years between the initial idea and the availability of the accommodation for rent or sale is not unusual. Developing housing is challenging – in particular in getting funding for feasibility work, raising the capital to build or refurbish, ensuring that the property remains a community asset in perpetuity and that the property which is developed (whether for rent or low cost home ownership) is affordable for local people.

The work on affordable housing links in with wider work on the acquisition of property assets by development trusts in Northumberland and with the wider work of the Development Trusts Association on asset development and transfer.

Over the next three years, FoNDT will:

- support DT's in Northumberland to access specialist funding now available for community land trusts
- maintain and enhance relationships with stakeholders to increase opportunities for development trusts in Northumberland to develop affordable housing e.g. HCA
- work closely with the Locality (DTA / Bassac merged organisation) nationally on this issue to give a high profile to Northumberland and to advocate for

developments in policy and funding which are accessible and of practical benefit to local development trusts.

## Securing investment

FoNDT needs to secure resources to take forward the ambitious programme set out above.

The FoNDT Executive leads in identifying potential sources of funding and developing applications.

There is an opportunity through joint working to improve the quality of funding bids and identifying potential sources, although there is a strong wish to move away from grant dependency access to external funding is a key contribution that DT's can deliver for the benefit of Northumberland not just for DT core funding but for the development and delivery of projects which would not happen without the involvement of DT's.

## Renewables

FoNDT Members have continued to actively promote the renewable energy agenda throughout Northumberland and NCC investment has partly enabled this work to continue.

24 Trusts will have gained knowledge regarding opportunities to increase future sustainability via renewable energy by the end of October 2011.

Berwick CT has purchased 50X solar panels which have a target date for fitting before the end of 2010. The Low Carbon Berwick Project has 200 energy monitors to loan out to residents of the Town and will be providing energy surveys and sourcing grants.

The significance of exploring and developing renewables opportunities is not only critical to the carbon footprint but also the potential sustainability of DT's through income generation and by organising visits and learning from best practice then sharing this with the membership it is a much more effective way of working for the benefit of Northumberland.

GMDT are at the feasibility stage for an AD plant which would be a c £2m joint venture with a private sector partner and the learning from this process will be shared with the membership and other interested partners.

GGT have carried out a feasibility study for a hydro scheme and shared this with other trusts. You could add in that GGT have now installed a met mast locally and will share the information and feasibility work with FONDT members in September 2011.

A visit to Fintry was a good example of collaborative DT work where 15 members visited a Scottish turbine project to share experiences with the potential of developing a member's collaborative project based in Northumberland.



The key to new areas of opportunity such as this is for sharing of information and not recreating the wheel when the potential is identified in a locality.

## 5 The Marketing Plan

A key aspect of the work of FoNDT since it was established has been to raise awareness of DT's with a range of statutory bodies in Northumberland and to build the reputation of FoNDT. At the strategy day in 2008, members identified marketing as a priority for the next three years.

FoNDT's "market" is all those organisations and individuals in Northumberland and beyond whose resources, skills and energies can be harnessed for the good of local communities in Northumberland. Clearly, an element of the marketing work is to support FoNDT's fundraising strategy. The broader purpose however, is to strengthen the ability of its members to deliver community based regeneration, it will continue do this by building effective relationships.

The plan developed will be proactive – seeking to make contacts with key organisations and individuals. The market plan will support the broader aims of this strategy. Delivery of the plan must also be cost effective – using the members of FoNDT as well as its staff – and streamlining this work with the work members already carry out to publicise their own trusts and involve key stakeholders.

The main elements of the plan are set out below. The plan will be reviewed on an annual basis – this will include setting priorities.

### 5.1 Branding

The acronym "FoNDT" has itself become a brand, being well known amongst members and those in contact with DT's. The aim is to increase the brand recognition and the section below on building relationships sets out key stakeholders where the FoNDT brand should be recognised.

### 5.2 PR and Publicity

PR and publicity is an important area of work for the Executive Committee and the wider FoNDT membership. Key actions over the next three years will be:

- developing and maintaining the FoNDT website bi-monthly
- developing and enhancing the bi-monthly FoNDT newsletter focusing not only on the impact of member Trusts but also what services they could provide and work with other DT's
- Development of A4 information sheets of case studies sharing best practice activities.
- A FoNDT Conference spring 2011 with a joint focus on Renewable Agenda



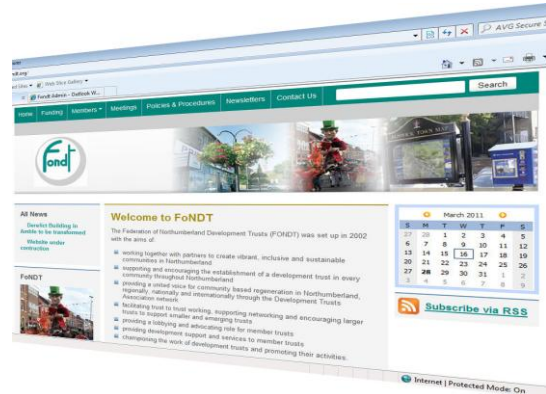
- Development of a promotional DVD to raise the profile of FoNDT and demonstrate the quality of what has been delivered by the membership to date but also future aspirations

### 5.3 Online Presence

FoNDT owns the domain name of [www.fondt.org](http://www.fondt.org) and now have a website.

The site highlights:

- membership of FoNDT and the work of each trust
- location of trusts
- links to individual member websites
- best practice from the experiences and achievements of FoNDT membership.
- There is potential to advertise services and highlight opportunities to members and have new elements such as events calendar, bulletin board etc. and the Executive would look to the membership to help maximise the impact of the site



### 5.4 Building Relationships

A crucial element of the work of FoNDT is to build relationships with stakeholders. The aim is that stakeholders recognise the work of development trusts in Northumberland. FoNDT is an effective means by which stakeholders can interact with trusts.

The target audience for this work will be informed by the wider strategy of FoNDT. Initially, the target audience for this work will be:

- new unitary authority officers and elected members
- Procurers of services primarily in the public sector including the Care Trust and local government.

To take this forward a priority for the FoNDT Executive will be to:

- instigate meetings and links with key unitary personnel including both officers and elected members
- Organise meetings and links with key personnel in other statutory organisations.

## **6 Conclusion**

The next three years are critical to FoNDT and its membership, but the next year is probably the most important where the members need to embrace the opportunity that FoNDT provides in securing their sustainable future and development. There probably has not been a more challenging economic and political scenario than we are currently facing but DT's have showed historically that they can face into adversity and help lead communities out of it.

2011/12 can be the year that kick starts FoNDT as being a key delivery organisation for Northumberland and a critical partner to all economic sectors – public, private and community and by demonstrating a “can do” attitude a foundation for the future of development trusts in Northumberland can be established and recognised.

## **Appendices**

**Appendix 1 Organisationsal Chart as of April 2011**

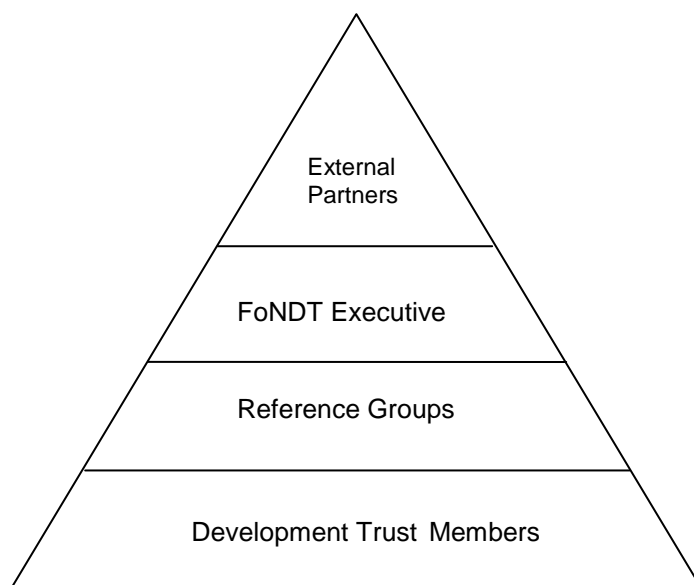
**Appendix 2 SWOT Analysis**

**Appendix 3 FoNDT Work Plan 2011-2014**

**Appendix 4 List of FoNDT Representation**

**Appendix 5 FoNDT Policies & Procedures**

## Appendix 1 Organisational Chart as of April 2011



Members are:

Allenheads Trust  
Alnwick Community Development Trust  
Amble Development Trust  
Ashington Community Development Trust  
ATAC (Widdrington)  
Bedlingtonshire Development Trust  
Belford Development Trust  
Berwick Community trust  
Craster Community Development Trust  
Fawside  
Glendale Gateway Trust  
Greater Morpeth Development Trust  
Haltwhistle Partnership  
Haydon Bridge & Haydon Parish Development Trust  
Hexham Community Partnership  
Holy Island of Lindisfarne Community Development Trust  
Longhoughton Development Trust  
Lynemouth Community Trust  
Mid Tyne Community Trust  
North Pennines Heritage Trust  
North Sunderland & Seahouses Development Trust  
North Tyne & Redesdale Community Partnership (Bellingham)  
Northumberland Toy Library & Children's Resource Centre  
Prudhoe Community Partnership

*(24 Members)*

## Appendix 2 SWOT Analysis

FoNDT has a valuable inventory of **strengths** that will help it succeed. These strengths include: passion, commitment, its breadth of members and the range of skills and experience available. However, it is also important to realise that there are **weaknesses** which must be addressed. These weaknesses principally are concerned with a lack of awareness of FoNDT and the fact that all members are not proactive.

FoNDT's strengths will help it capitalise on emerging opportunities. These **opportunities** include, but are not limited to, unitary reform and the climate favouring the role of Development Trusts. **Threats** that the organisation should be aware of include the loss of funding which could hamper the ability to develop projects, and a fragmentation of the membership.

## Appendix 2 SWOT analysis

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> <li>○ Development trusts ability to influence policy agenda</li> <li>○ Shared knowledge/information</li> <li>○ Individual trusts and staff</li> <li>○ Size of community mandate</li> <li>○ Range of skills and experience</li> <li>○ Track record</li> <li>○ Passion/vision</li> <li>○ Commitment</li> <li>○ Recognition, well represented</li> <li>○ Strategic plan</li> <li>○ Able to take on themes</li> <li>○ Collaborative/dynamic approach</li> <li>○ Credibility</li> <li>○ Strength of development trusts</li> <li>○ Driven from bottom up</li> <li>○ Coverage</li> <li>○ Proactive</li> </ul>	<ul style="list-style-type: none"> <li>○ Focal point for external agencies being addressed/communication</li> <li>○ Lack of awareness of FONDT</li> <li>○ Limited marketing of FoNDT as an organisation</li> <li>○ Lack of collective delivery track record</li> <li>○ Difficult to define given diversity of activity</li> <li>○ Lack of management capacity (resource)</li> <li>○ Reliance on small number of individuals</li> <li>○ Sustainability of long term FONDT infrastructure</li> <li>○ FONDT officers/boards, how representative/governance</li> <li>○ Ability to generate income</li> <li>○ Lack of dedicated staff</li> <li>○ Lack of funding for FoNDT as an Organisation post March 2011</li> </ul>
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> <li>○ Unitary Authority Procurement</li> <li>○ Town/Parish councils (LGR) partnership of services and delivery – partnerships</li> <li>○ Housing – HCA Agenda</li> <li>○ Assets – income generation</li> <li>○ Contracting services – LSC/JCP (limitations/focus)</li> <li>○ Communication/good practice</li> <li>○ Leadership at community level, local issues/advocacy</li> <li>○ Focus and mandate clear to sell, individual DT</li> <li>○ Proactive approach of DT network to take on new ideas/project</li> <li>○ Fuel problems = local opportunities</li> <li>○ LEPS</li> <li>○ Big Society</li> </ul>	<ul style="list-style-type: none"> <li>○ Withdrawal of funding support</li> <li>○ Fragmentation of membership</li> <li>○ Isolation within VCS</li> <li>○ 25% Reduction in LA budget</li> <li>○ Centralisation of tendering</li> <li>○ Gaps in county wide delivery</li> <li>○ Recession</li> </ul>

### Appendix 3 FONDT WORK PLAN 2011-2014

Strategic Aim	Action	Who	Timescale
Further development of the representation and advocacy function.	Develop marketing Plan and set targets for 2011/14	Exec	
	Further Develop Website	CC / All	
	Bi monthly Newsletters	CC / All	
	Development of Promotional DVD		
	Develop case studies about members trusts		
	Build relationships with personnel from unitary authority	Exec	
	Build relationships with other statutory agencies	Exec	
	Review plan and set targets for 2011-12	Exec	
	FoNDT Conference 2011	Berwick	
	Develop and support joint contracting by member trusts	Identify opportunities	
Research good practice models			
Support NCC research groups			
Development of Procurement project			
Support the development of community based affordable housing.	Provide specialist advice and support for potential affordable housing projects		
	Liaise with stakeholders around increasing opportunities to develop affordable housing		
	Input /maintain policy links nationally around affordable housing and Community Land Trusts		
Secure support and investment to ensure that FoNDT can continue to support community based regeneration in N'land.	Develop and implement a funding strategy		
	Encourage take-up of new funding streams for Community Land Trusts		
Sustainability & Development of members	Sustainability checks / Membership database		
	Professional support visits		
	Quality Assurance mark		
	Asset Development		
	Social Enterprise collaborative working/development		
	Development of Communities events programme		
Renewables	Share best practice		
	Joint project across DT's		



## Appendix 4 List of FoNDT Representation

Organisation	Representative
NSP Board	GMDT
VCS Consortium	Lynemouth
Innovation Group	GMDT/Wooler
AONB	Seahouses
ICCQ	Lynemouth
DTA	GMDT/Seahouses
Market Towns	GMDT
CAN	Lynemouth
Young Foundation Social Enterprise	GMDT
North Northumberland Partnership	Berwick / GMDT
West Northumberland Partnership	TBA
Leader - Coast	TBA
- North Pennines	TBA
- Uplands	TBA
Northumberland Tourism	GMDT

## Appendix 5 Policies & Procedures

### FoNDT POLICIES & PROCEDURES

	<i><b>POLICY HEADINGS</b></i>
<b>1</b>	Age and Employment
<b>2</b>	Alcohol, Drug and Substance Misuse Policy
<b>3</b>	Code of Conduct
<b>4</b>	Computer Security Policy
<b>5</b>	Disciplinary & Capability Procedure
<b>6</b>	Equal Opportunities
<b>7</b>	Financial Policy & Procedure
<b>8</b>	Grievance Procedure
<b>9</b>	Health & Safety
<b>10</b>	Protection of Children and Venerable Adults Policy
<b>11</b>	Recruitment & Selection Policy and Procedure
<b>12</b>	Redundancy Policy
<b>13</b>	Retirement Policy
<b>14</b>	Risk
<b>15</b>	Sickness Absence Reporting Procedure
<b>16</b>	The Management of Attendance at Work
<b>17</b>	Trustee Grievance
<b>18</b>	Whistleblowing Policy
<b>19</b>	Youth Trainees and work Experience Placements