

## PROGRAMME GUIDANCE

### Invest Local Steering Groups – Mandatory Guidance

The Invest Local steering group are the people who lead Invest Local in your area. The majority of members are people who live within your Invest Local area. The group is responsible for agreeing a shared vision, creating the Driving Change plan and overseeing its delivery. In this document we are calling the groups that run Invest Local in each area ‘steering groups’, but there is no need to use this name and groups can call themselves whatever they wish.

#### What the steering groups do

The steering group is the way for people and organisations locally to decide priorities about how their area can be improved. The way that this group comes together and works is critical in making sure that Invest Local is a genuinely local, resident and volunteer-led programme. We also expect you to have locally agreed policies and procedures that are right for your area, such as a code of conduct and arrangements for dealing with conflicts of interest.

The role of the steering group is to:

- Bring together the community's views, make the overall decisions about how Invest Local will work in your area, and develop your Driving Change plan to use your £1million.
- Ensure Invest Local is resident-led and that people across the area have a genuine and continuing opportunity to be involved.
- Provide leadership to the programme in your area including directing the local Fundholder on spending decisions.
- Work with the local fundholder(s) to ensure the Driving Change plan is carried out
- Review the plan, in order to create a follow-on plan for future years
- Connect with local organisations, businesses, public agencies, councillors and others who can deliver activities and help make Invest Local a success
- Provide a forum where local organisations can work together and build stronger relationships

## What we expect of Invest Local steering groups

Broadly, we expect groups to:

- Encourage a range of people in your area to be involved, in an inclusive and meaningful way.
- Work openly, which means involving others and recording and communicating how decisions are made.
- Behave in line with your locally agreed code of conduct and governing arrangements.
- Manage any conflicts of interest effectively and report any potential misuse of funds to BCT.

## Criteria for Invest Local steering groups

Each group is designed to reflect the characteristics of your area and will therefore be unique.

All Invest Local Steering groups have started as open forums; there are many advantages to this as it allows anyone to get involved. However, when the group needs to make decisions, this can have disadvantages.

Groups need to have ways of making choices – and that means that they need to be able to make decisions that some people disagree with. This means that groups will ultimately have to decide who can vote; be that local groups, residents, or other organisations or some mix of the three. Other people can attend meetings and have their voices heard but there will need to be a voting membership who formally make decisions. Each partnership must meet these criteria:

- It must have at least eight members with voting rights (defined in some form of constitution or terms of reference). Members can represent named groups or sit as individuals.
- People from agencies can sit as members of the groups, with or without voting rights.
- The majority of voting members should live within the area's boundaries.
- Invest Local steering groups must have a designated, named Chair or Chairs (this role can rotate between a number of people); if there is only one Chair, a Vice Chair should be nominated.
- The group must keep records of its meetings and decisions.

Invest Local officers are available to help with the development of the constitution or terms of reference, which must be completed and agreed with BCT before the Invest Local plan can be agreed.

We recommend that if groups are represented that the numbers representing each group are limited and that they take clear responsibility for reporting back to each group.

If individuals sit on groups, it is recommended that they should attend a certain number of meetings before acquiring voting rights. This means that people taking decisions are properly informed before they take them.

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

## **Delivering Invest Local and distributing funding**

At the moment, Invest Local steering groups do not directly hold or distribute the Invest Local funding. Instead, money is transferred to your local fundholder(s) to meet the costs of your Driving Change plan.

As a steering group, you are not expected to deliver your Driving Change plan yourselves. But you are expected to have oversight of it - to choose and monitor your Fundholder and other bodies delivering particular parts of your plan. You need to be comfortable with the process for agreeing who will deliver services and activities in line with your plan and how you will monitor it.

## **Working with your fundholder**

The role of the fundholder is essential to Invest Local. They are responsible for holding and managing money on behalf of the group and quite likely for employing any Invest Local staff you choose to have. They are legally responsible to BCT for the spending of Invest Local money and will need to ensure that critical guidance (such as on safeguarding) is followed. They will ensure that all actions are consistent with their obligations to BCT and meet other legal responsibilities.

It is essential that steering groups and fundholders have a strong open relationship. Fundholders need to respect that fact that steering groups make the main decisions. Steering groups need to understand that fundholders need to act in line with their agreements with BCT and wider legal responsibilities.

The appointment of fundholders is a decision for steering groups. Steering groups may change their fundholders if they are unhappy with their performance or there is a breakdown in relationships. In the event of conflict BCT will try to mediate, but if that proves unsuccessful we will help steering groups to find a new fundholder. It is also possible for steering groups to take on the fundholder role, but that will require setting up a new organisation – you will need to carefully consider advantages and disadvantages of doing this. BCT can give you advice on this.

## How we endorse your partnership

Once you have agreed a constitution or terms of reference, submit it to BCT (via post or email) and we will discuss whether it meets our criteria (set out above). It should be accompanied by a list of members, state how many of those are local residents and who the chair(s) is/are.

If the constitution meets our criteria we will let you know within two weeks of the receipt of the documents. Then you will be able to submit bids for Driving Change funding. If your group does not meet the criteria on membership numbers, you may submit a Driving Change plan but only for a maximum of £50,000 as you will not have the agreement of sufficient community members to draw down larger amounts. Some of the actions in the plan will need to be geared around expanding the levels of resident involvement.

## Reviewing your steering group's work

How you choose to review your Invest Local steering group is up to you, but you will be required to respond to these questions:

- How many members are there?
- How many of these members are residents?
- Is the partnership behaving in line with the Invest Local values and ethos?
- Is the partnership following locally-agreed procedures, including a code of conduct?

Reviews should be carried out every two years after we agree your constitution/terms of reference.

## How you can use the review

The steering group review provides you with an opportunity to review:

- To what extent the group reflects and represents the community.
- Your needs for development and support.
- Whether your structure and ways of working are a good fit for your area.

Submit your review to your Invest Local officer. If your group no longer meets our criteria, you will need to tell us what you are doing to meet them, and your timeline for achieving this.