Local Trust
trusting
local
people

Take
A Part

Commission professionals to help deliver your project

A COMMUNITY ACTION PLAN



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Cover: Big Local Connects. Photo: Local Trust /Richard Richards

What is commissioning?

Commissioning is a fantastic way to bring new energy, experience, expertise and support to your project or community.

It involves contracting people who have expertise in specific areas to collaborate on and help deliver your community's ideas. They can deliver the work and free up capacity for you to be more strategic, or to focus on other areas of your community work. For example, you might not have time to do an evaluation, so you could commission someone else to do it for you.

If you have a project in mind for your community – from setting up a new youth service to creating a community allotment, developing a community festival, building new seating in your local park, or starting a new service for older people – you can use commissioning to bring in the capacity and expertise you need, without having to directly deliver the work yourself.

This action plan has been written by Take a Part, an arts organisation who are experts in commissioning creative projects for communities, and Local Trust. It will help you learn how to write a good commissioning brief, how to attract quality responses, how to set up and manage a contract, and finally, how to evaluate the commission. It also includes a case study from Sompting Big Local.

Here are some more examples of services you could commission:

- **A facilitator** to help with community engagement.
- **A fundraiser** to advise on who you can approach or apply to for funding, or to write funding bids on your behalf.
- **A marketing or communications expert** to help you work out who you want to reach and how, and to help you tell your impact story.
- **A maker or artist** to make your marketing materials beautiful, or to help create bespoke signs or furniture for community events or spaces.
- **A gardener** to help you manage your community allotment.
- **A researcher** to find out how people in your community feel about something, or to evaluate one of your projects so you can explain its impact.

WHAT IS A COMMISSIONING BRIEF?

The brief, sometimes known as a call for services or proposals, or an invitation to tender, is a document that describes the work you need help with. The strongest briefs are … brief! Not more than two or three pages long.



How to write a good commissioning brief

The first step to commissioning someone is describing the work you need doing in a document called a brief. The brief sets out your timelines, budgets, desired outcomes, areas of work and target audiences. An individual, organisation or group of organisations (a consortium) can then respond to your brief and outline how they would approach the work. These are usually referred to as contractors, consultants, agencies or suppliers.

Commissioning works well if you are clear from the start about the key elements of the work. Clarity is the most important part of the process. The clearer you are in the brief, the easier it will be to set up a contract with clear outputs, payment schedules, deadlines and ways of working.

When you're commissioning work, consider the following questions to help create your brief. In the next section, you will also find an example of a commissioning brief which you can use as a guide.

About your organisation



- Why do you exist? What is your purpose or your theory of change?
- What is your area and community like?
- How does this piece of work fit into your broader strategy?

Give lots of detail about your community, so contractors understand the local context, the partners you have, and your needs. The more they know the better they will be able to respond to your asks. It can be helpful to include a link to your website.



Youth event at Heston West Big Local. Photo: Local Trust / Leila Nicholas

Aim of the work

- What do you want to do and why?
- Why is it important and needed now?
- How soon do you need it done?

Be clear about the need for this particular project. Give some context about how and why it has come about as an idea and who has been involved to date.

PARTICIPANTS/TARGET AUDIENCES

- Who do you want to reach or engage with?
- What do you want them to know / think / feel?
- Do you know your target audience already and can you introduce your contractor to them? Or do you want the contractor to identify a new group of people or create new relationships?



For example, you might want to liaise with an existing local residents group about a new development, or start engaging young people in your activities.

OUTCOMES

- What do you want to achieve by the end of the work?
- What would be a good outcome for your area?
- What does success look like?

For example, you might want to increase the number of people attending your activities, establish a new community growing space; run a festival, or help people feel less lonely or safer in your area.

These outcomes, also called Key Performance Indicators (or KPIs), can be used to measure and manage the project. If you want the contractor to deliver 10 workshops and one community fun day, state this. If you want them to attend three partnership meetings to devise the work and create a report, make sure you are clear about this in the commissioning brief.

It's important to set out what you expect of your contractors. They may come back with different suggestions and a slightly different approach to the work, which you can discuss before agreeing the KPIs together.

TIME



- When do you want the work to be completed?
- When is your team available to work with the contractor?
- When do you need the contractor to start and how many days do you want them to work?
- If there are specific groups you want to engage with, are there days of the week that are best for the contractor to meet with them?

For example, if you want to engage a residents group, your contractor could attend their next monthly meeting.

Make sure you're clear about the deadline and any key dates along the way.

PARTNERS

- Who are the local partners that the contractor should or could work with?
- What networks already exist in your area that the contractor could work with?
- Are there trusted people in the community that you can engage as champions or involve in co-designing the work?

Think about ways you can leverage the energy and work of others in the area to achieve impact, rather than reinventing the wheel.

BUDGET

- How much money do you have to work with?
- Is your budget reasonable considering the amount of work you require?
- Have you taken VAT into account? It's easier for contractors to work to your budget if you specify whether it includes or excludes VAT. Charities can qualify for VAT relief.

Make sure you build in contingency so you have some wiggle room for unexpected things (5-7% is normal). It is also really important that you pay people fair rates for their expertise and time.

Top tip:

HOW TO SET A BUDGET FOR YOUR WORK

Look at tenders for similar work, or speak to a partner organisation or group that has commissioned similar work before to get an idea of day rates or project rates.



The Big Local Connects event in Nottingham. Photo: Local Trust / Richard Richards

MANAGEMENT

- Who from the community will help you manage the work?
- How often will you meet with the contractor?
- What will you ask the contractor to provide and what will you provide?
- What do you need to put in place to ensure that good lines of communication are open between you?

For example, you might agree to meet once a week to go through updates and progress. You might ask the contractor to create the agenda for the meeting, take notes and share them back with you.



Youth event at Heston West Big Local. Photo: Local Trust / Leila Nicholas

CRITERIA

- What information and evidence do you need from a contractor to make a decision? For example, a CV, examples of past work, and how they will do the work.
- What is most important in your decision-making process? For example, is it more important for the work to be done by someone with relevant experience, rather than the cheapest contractor.
- What criteria will you use to score the different responses and shortlist them? For example, value for money, approach to the work in terms of time/methods/budget, alignment with your values, relevant experience. Pick criteria that are not subjective such as whether a proposal is 'innovative' or 'creative', unless you define those terms clearly in your brief.

You then want to have enough oversight and sign-off points so that you can keep on top of the commissioned work and its progress.



WHAT INSURANCE SHOULD YOU ASK FOR?

When you commission someone to work on your behalf, it's wise to ask them to have insurance. This covers risks so that, if something goes wrong, they can claim and compensate you. The two main types of insurance to think about are:

- **Public liability insurance:** This business insurance protects the person you commission if a third party takes them to court after an accident – whether there's been damage to their property, an injury, or death. They are covered for any legal costs that result from their business activities, and their insurer will also cover them if they're ordered to pay compensation. They will be protected on your premises.
- **Professional indemnity insurance:** If you're commissioning someone to give you strategic advice, such as legal, financial or even marketing, you could ask them to have professional indemnity insurance. This means if you suffer any losses as a result of the advice they gave you, or the work they did, they'll be able to claim against their insurance and compensate you.

You may also want to ask the contractor to have:

- **Business content insurance:** if your contractor is storing materials on your premises
- **Tools cover:** particularly for tradespeople working on your site.

WHEN DO YOU NEED INSURANCE?

Although contractors have their own insurance, your organisation will also probably need insurance for your teams, your volunteers or your building so check with your insurance provider to be sure (and safe!). The key is knowing what you want to have covered. For example, if you are planning an event or series of events, you'll want to think about the number and type of event, the number of people attending, and the objects you need to insure, such as a bouncy castle. You can buy multiple events insurance or single event insurance. If you need to buy insurance, it's worth comparing insurance coverage and rates on insurance comparison websites.



INSURANCE, RISK ASSESSMENTS AND PERMISSIONS

- What insurance does the contractor have in place?
- Do you want them to have a Disclosure and Barring Service (DBS) check? This checks someone's criminal record, so it's particularly important if they will be working with children, young people and vulnerable adults. Check out this DBS eligibility tool on the government website to help you assess whether the activities you are commissioning are eligible for a basic, standard or enhanced DBS check.
- How will the contractor manage risk? For example, you may want them to create risk assessments or a risk register before starting the work.
- Will the contractor make sure any permissions are in place at events? For example, you must apply for a Temporary Event Notice from the council if you want to host an event that sells alcohol or serves food.

Although you might not have all of this in place at the time of writing your brief, it's important to think about these points and ensure you have everything signed off before you commission and sign a contract with anyone.



WHO DO YOU COMMISSION FROM?



The term 'contractor' is a general term. It is used to describe an individual or organisation you have a contract with to deliver work. That could be a local person who has a passion for gardening projects, or a local business who are great at graphic design.

Other terms are sometimes used to describe specific types of providers and services, such as:

- **Consultants:** usually people who can give you advice about how to do something specific, such as fundraising. They may create a strategy for you, train your team and help you implement their advice.
- **Agencies:** these tend to be organisations that have lots of people working for them, who can deliver different skills. For example, a digital marketing agency might have graphic designers, website developers and copywriters available to work on your project.
- **Suppliers:** these tend to supply products, such as tables and chairs for events, or services such as event planning.

Don't worry too much about the terms.

An example brief

PROJECT BRIEF – WHAT DO YOUNG PEOPLE WANT FROM THE LOCAL AREA?

Commissioners

A Big Local area, partner group, partner organisation and local authority.

About us

The Big Local partnership and other local organisations are working with local secondary schools to engage a wide range of young people, through a series of youth engagement test events and drop-ins.

We are doing this to learn directly from the young people, through fun and varied activities. We particularly want to understand what they would like out of youth provision in the area, so we can shape a service that is wanted, needed and sustainable.

Background to the project

This Big Local area is a voluntary community partnership that is working to increase job opportunities locally. We have a higher than average number of young people on our estate, but have little or no service provision for young people.

Post pandemic, we are seeking to re-engage the youth of the area to give them more of a say in the services they want and need. Currently 14% of local young people are Not In Education, Employment or Training (NEETS), according to the 2021 Census. We are keen to bring this down by providing youth provision, but need to make sure it is appropriate and co-designed with young people.

The commission

We want to work with a youth engagement specialist to investigate how our local young people would like to engage with youth provision by running:

1. A series of 20 workshops

These will be run on the premises of the two local schools over the course of autumn term. The workshops need to be accessible for all abilities and appropriate for 12 to 16 year olds. We expect you to co-design these with the media and event management groups.

2. A larger scale community drop-in

There is a local community centre with a kitchen. We would like you to test some youth provision drop-in sessions here, for both local children and parents. You will be in charge of marketing the drop-in, with support from the organisations commissioning the work.

3. A celebration event in the local area

This will involve students from the two schools and workshop participants. It will help us launch the new youth provision in the area.

This work is going to inform our Big Local area on how we commission a wider series of youth programmes; what works and doesn't work across the area; and where we want to place our energy and budget moving forward.

We want this to be easy, fun and engaging for everyone. And we want to be able to measure the impact of this work.

Commission aims

- More diverse engagement with young people across art, sport and other forms of creative community work, so it is more representative of the local young people's ambitions.
- To understand what local young people want and don't want in terms of youth provision.

- Inclusive and accessible, so people can take part at any entry point.
- Workshops should be fun, engaging and support learning.
- Use the local area, including community centres, halls and parks, and explore them through the process.
- Upskill young people in the area by giving them a chance to try out things like documentation, marketing on social media and helping to set up events. Note: safeguarding needs to be in place.

Contractor experience:

We expect the commissioned facilitator to have experience of working with young people. We want to work with people who value community engagement and creativity.

Outputs:

Contractors will be expected to support/lead on the evaluation of this work. We encourage this evaluation to be engaging and fun, and to result in an engaging evaluation report.

We would also like to learn from our contractors, including what their experience and recommendations for our Big Local area may be, via a summary report after the work has been completed.

Timescales and budgets:

A fee of £6,000 excluding VAT is available for all 20 workshops/events, artist time, travel and materials. A total fee of £10,000 excluding VAT is available for this work. We expect this work to commence in Autumn [year] and to be completed by [month/year].

Criteria and assessment process

Representatives from our partnership will be assessing responses using the following criteria and weighting:

1) Written response (60%)

- Relevant experience 10%
- Value for money 30%
- Alignment with our values 20%

2) Interview/presentation (40%)

Shortlisted applicants will be invited to a short 30 minute conversation to present their approach in more detail. We will give attendees a £50 honorarium to cover their time of attending the meeting.

Applicant schedule:

- 20 August: Expressions of interest returned
- 24 August: Interview/presentation for shortlisted applicants
- First week of September: Applicant interviews/site visit and information day
- Second week of September: Contractor appointed
- Last week of September: Project start

For an informal chat or questions about the commission please contact [name] on [email address]

To apply, please send:

- CVs
- An outline proposal of the work including cost breakdown, project timeline and activities
- Examples of past work and two referees

To [email address]



How to attract quality responses and assess them

Now you've written a great brief, you need to send it out to tender, which means advertising the opportunity. Then you'll receive responses back, so you need to be clear about how you will assess them. You may even include your assessment process and criteria in your brief. It's important to have a transparent and fair decision-making process.

How to send your brief out to tender

When you're ready to list your opportunity, you can:

- Speak to partners and organisations that are doing the work you are interested in commissioning, and ask them how they find and share opportunities.
- Identify local, regional or national experts who can support you by sharing your brief and listing it on their platforms. For arts-based projects, Arts Council England has the Arts Jobs listing. This article from Creative Lives in Progress also has some great tips on where to list creative briefs.
- Approach freelancers directly through a directory. For example, CharityComms has a marketing and communications freelancer directory. For environmental projects, check out the consultant directories from the Environmental Services Association or the Chartered Institute of Environmental Health.
- Many councils have lists of approved youth service providers so check their websites.
- Ask local organisations and partners aligned with the work you are commissioning to share it with their networks.

You want to aim for at least three responses if possible, as this will give you a good number to compare services/offers and ensure project costs are competitive.

Clarifications and getting quality tenders

Before responding to your brief formally, potential contractors may want you to clarify a few things. They may ask you questions by email or they may ask for a call. Do make time to speak to anyone who wants to apply, so they can talk through your ideas in more detail. Make sure you share the clarifications with all the applicants to make the process fair.



How to assess responses

Decide who will be assessing the responses and what process you will take. It's usually helpful to write down a set of criteria. For example, you may want to assess responses on:

- Previous experience that is relevant to your project. This could save you time, and demonstrates the contractor can deliver.
- Value for money. Remember, the cheapest proposal is not necessarily the best.
- Approaches that align with your values.

Score each response individually and then meet with everyone assessing the responses to compare scores and notes. What did you like about each approach? What concerns you? What would you like to dig into deeper?

Pitch meetings

- If the scores are similar between a few proposals, invite each contractor to an individual pitch meeting where they can bring their proposal to life and answer any additional questions you or they have. These face-to-face meetings can also build trust. Check whether anyone has any accessibility requirements or needs reasonable adjustments to participate in this meeting.
- You should take notes during each pitch meeting and then decide who you think you will work best with. You may decide there is a proposal which is clearly going to deliver what you want and scored much more highly than the others. In that case, you can go ahead and contract them.
- After the assessment process, do give constructive feedback to the other applicants as it helps them understand why they weren't a good fit and how they can improve their proposals in the future.



Compensating contractors for their time

If responding to your brief requires a lot of work from contractors, consider giving anyone that is tendering a fee, especially if they are freelancers. This is called an honorarium. Tendering - pulling project outlines together and coming up with good pitch ideas for you - takes time away from being able to work on other projects and jobs. An honorarium fee should be less than the day rate someone would charge but you can ask tendering contractors what they think is a fair fee.

How to set up a contract and manage the project

Once you have decided who you would like to work with, you can set up a contract between you. This agreement is a must when you commission. It will set out things like start and end dates, deliverables, payment schedules, line management, insurances, evaluation, key outcomes, what happens if things go wrong, data protection and more.

If the contract is co-created between the lead (you) and the contractor (the hire), then you can get clarity on all the details and ensure that the contract is understood together. It's important that everyone is happy with the terms. And it will help you manage the work.

WHAT SHOULD YOU INCLUDE IN A CONTRACT?

The length and details of your contract should be proportionate to the value of the work you are commissioning, its complexity and risk. For example, if the work you are commissioning is only a few hundred pounds to hire some chairs for an event, a simple agreement between the parties may be enough of a contract. But if, for example, you were commissioning an agency to deliver multiple parts of a project handling personal data, worth a few thousand pounds, it would be wise to put a more robust contract in place.

Here are two checklists of what a simple agreement and a standard contract would usually contain. Any contract you create will need a 'Schedule of Services' attached to it which will include Key Performance Indicators, when they need to be completed by (milestones) and by who.

Note: This guidance is not legal advice. If you are in doubt, please seek legal advice to review your contract. You may be able to get pro bono (free) legal advice.

SIMPLE AGREEMENT LETTER (EXAMPLE CONTENT)

- Your organisation's name and address, and contact name and email address
- Contracted party's name and address, and contact name and email address
- Contract value
- Date of the agreement
- Services: You agree to provide, and we agree to purchase, the Services in accordance with the agreed terms and conditions in this letter. Add a description of the services.
- Term (when will services start and end)
- Provision of services terms and conditions
- Dated signatures of you and contracted party

STANDARD CONTRACT (EXAMPLE CONTENT)

- Your organisation's name and address, and contact name and email address
- Contracted party's name and address, and contact name and email address
- Contract value
- Date of the agreement
- Legal definitions of words
- Project specification
- Provision of the services
- Client's obligations
- Fees, payments and records
- Liability, indemnity and insurance
- Confidentiality
- Force majeure
- Term and termination(when will services start and end)
- Effects of termination
- Data processing



Par Bay Big Local.
Photo: Local Trust / Charlotte Sams



- No waiver
- Costs
- Time
- Relationship of the parties
- Third party rights
- Notices
- Entire agreement
- Counterparts
- Severance
- Law and jurisdiction
- Dated signatures of you and contracted party
- Services / deliverables specification (often a separate schedule added to the end of the contract)
- Fees and payment linked to project milestones (often a separate schedule added to the end of the contract)

HOW DO YOU MANAGE A CONTRACT?

Once contracted, you can start to manage the project. This is when the fun happens and the hard work you put in at the commissioning stage pays off. Start off by agreeing the cost breakdown of different activities, work plans and schedules of check-ins and meetings in more detail.

It's worth planning a meeting to kick-off the project, where you can set expectations, go through roles and responsibilities, and agree deadlines and ways of working. You may prefer communicating by email, phone, video platforms like Zoom, or project management platforms such as Slack, Teams, Monday, or other digital platforms. You then want to have enough oversight and sign-off points so that you can keep on top of the commissioned work and its progress.

- Remember, you are there to oversee the delivery of the work (rather than do it yourself).
- Make sure that the contractor has access to the right people, spaces and equipment that you have in your area so they can do the best job.
- Make time for regular communication from this point through to completion, so you can stay on top of the outputs.
- Book in catch up meetings, for example every two weeks, and wider project meetings (to dig deep into the budgets and work plans) once a month to stay on track.
- Give your contracted person or people a lead contact in your organisation for easier communication.

If things start to go amiss, get on top of it quickly. It's easier to fix any miscommunication or mistakes early, rather than letting them go on and potentially wasting time and money.

Remember, good, consistent communication is key!



The Big Local Connects event in Nottingham.
Photo: Local Trust / Richard Richards

How to evaluate your project

Delivering a community project is an opportunity to collaborate with your community and learn from each other. Evaluating your project and learning from it will help you to do things better next time. Failures are as much a part of the process of learning as successes are. Bring everyone involved in the project together at the end to assess its impact and how well you worked together.



The Big Local Connects event in Nottingham.
Photo: Local Trust / Richard Richards

This coming back together is generally called a 'project wash-up' and involves the commissioner and the commissioned group or person meeting in-person or online. It should be open, fair and a two-way conversation to probe the work with some exploratory questions:

- What do we think went really well?
- What could we have done better?
- What did we learn?
- What were the outcomes we did not expect?
- If we were to do it again, would there be things we could do differently?
- Is there any appetite in the community to grow this work and if so, how?
- What data did we collect that we can share?
- How can we use this data? For example, sharing it back to the community or with funders to show the project's impact.

You could ask your contractor to write this up as an evaluation project for future reference.



Case study: How Sompting Big Local commissioned local youth services to engage with young people

Sompting Big Local is based just outside Worthing, on the south east coast of England. They wanted to get young people involved in their work, but never had the time or headspace to do it properly.

They decided to take a commissioning approach as they had limited capacity and knowledge to run the youth engagement programme themselves. They approached two local organisations who were experts in youth provision – Sid Youth (who they'd worked with before) and Audio Active. After talking and planning together, they commissioned them to put on a large summer event and then a term of youth group type activities, with the aim of finding out what young people want in Sompting.

Sompting Big Local was supported by Take a Part. They helped Sompting Big Local to avoid pitfalls and made sure everyone knew what they were doing and who was responsible for what.

> "It has been in our plan for a while, but it never really got off the ground. We had several false starts."
>
> Sompting Big Local member

> "It was slow initially, while we tried to figure out what we wanted and who to get involved with. But once we sat down for a couple of meetings with the two organisations, the ideas and plan came together quickly. After we commissioned it, Sid Youth took the lead and organised the event in a matter of weeks."
>
> Sompting Big Local member

> "When we've commissioned work before, it felt more like what the organisation wanted to do rather than what we wanted to do. This time, sitting down with the organisations and talking though our ideas and theirs, was really beneficial."
>
> Sompting Big Local member



A community event at Sompting Big Local. Photo: Sompting Big Local

JUST THE BEGINNING

This action plan has been created to help you commission work and deliver community projects that you may not have the time or expertise to deliver yourself. Leaning on and collaborating with others can be a really liberating and creative process, and can help you achieve your aims more quickly.

If you've found this toolkit useful, share it with someone else who might too!

SHARE IT



About Local Trust

Local Trust is a place-based funder supporting communities to transform and improve their lives and the places in which they live. We believe there is a need to put more power, resources, and decision-making into the hands of communities.

We do this by trusting local people. Our aims are to demonstrate the value of long term, unconditional, resident-led funding, and to draw on the learning from our work delivering the Big Local programme to promote a wider transformation in the way policy makers, funders and others engage with communities and place.

localtrust.org.uk

@LocalTrust

About Big Local

Big Local is a resident-led funding programme, providing 150 areas in England with £1.15m each to spend across 10 to 15 years to create lasting change in their neighbourhoods. The programme is funded by the National Lottery Community Fund.

About Take a Part

Take A Part is an arts organisation who are experts in commissioning creative projects for communities to take action where they live – improving their local environment and in turn, instilling pride, ownership and agency; improving mental health & wellbeing and increasing appreciation for understanding of the value of culture in everyday lives.

takeapart.org.uk

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