

LocalMotion Learning and Knowledge Exchange Partner Brief:

Invitation for Expressions for Interest

About LocalMotion

LocalMotion is a collaboration of six independent foundations, and people in six places in England and Wales, who have come together to tackle the deep-rooted causes of social, environmental, and economic injustices facing local communities.

As funders we came together to reach beyond our individual focus areas so that we can:

- Work with a wider range of people and organisations
- Offer far greater flexibility in the range of support we provide (that goes beyond traditional grant making approaches)
- More effectively learn what is needed from funders (and others) to truly support systemic place-based change across a whole local authority area and
- Distribute our power as funders towards local communities' priorities.

The six foundations that make up LocalMotion are:

- [City Bridge Trust](#)
- [Esmée Fairbairn Foundation](#)
- [Lankelly Chase](#)
- [Lloyds Bank Foundation](#)
- [Paul Hamlyn Foundation](#)
- [Tudor Trust](#)

The six places are Carmarthen, Enfield, Lincoln, Middlesbrough, Oldham and Torbay.

The foundations came together with the six LocalMotion places out of a sense of frustration that our current funding model isn't working as well as it could for the communities, issues, and people we are here to support. It has cemented around two key objectives.

- to see if we can work more closely together to better use our collective resources, experience, and strengths, to make a long-term systemic change locally.
- to explore how this way of working challenges current foundation practices more broadly.

Appendix 1 gives an overview of the LocalMotion initiative.

We know that we don't have the answers, and we know the risks of top-down imposed approaches, especially if they're led by funders; so we think the only way this can be achieved is by working with local partners who want to find solutions to the social, environmental, and economic injustices on their doorstep.

We believe that connections create change so building strong relationships and including diverse perspectives in the work is key to our goal of achieving lasting systemic change. We

are working with core groups of people in each of the six places. These core (or working) groups are made up of cross sector representatives from communities, charities, the public and private sectors. We are leading with relationships, an understanding of strengths and the action people want to take – not the resources that might be available from funders.

We are keen to learn as much as possible from working with people in the six places so that we can re-imagine funders' approaches to tackling the root causes of the social, environmental, and economic injustices that matter to communities.

Development stage background

For the last 18 months LocalMotion has been in a discovery phase with the six places, with a view to establishing what might be possible if the foundations' put their collective expertise and resources together with local places. This phase has been one of developing our understanding of the existing strengths, local assets, and relationships in the six places.

Following this phase, the six foundations and the six places have committed to working together on a two-year development phase. LocalMotion will make a £3.5m investment over the next two years in working with local places to unlock change, developing an approach to knowledge exchange and learning that will connect people with inspiring ideas, and create space where we can reflect on what we are learning. We hope to build networks within and across the six places that will support collaboration, constructive challenge and celebration of what we learn together on this journey.

There will be another decision point on further investment from the funders in 2023. This will be based on the longer-term road maps places create and a shared view (between places and funders) on progress over the next two years.

This development phase will allow us to take on common challenges together, develop shared plans to tackle those challenges and create a longer-term road map for the remaining 8 years of this potential 10-year initiative. Due to the pandemic our work so far has been conducted largely virtually.

We are now building momentum towards longer term change – unlocking the power of people's experiences to transform what is possible through local place-based collaboration.

Our approach to change

We believe that building positive relationships and shared values between and across sectors in a place - together with focusing on everyone's potential and building capacity - ignites the shared action that leads to transformative change.

The driver for this collaboration is the desire for everyone to thrive, no matter what their starting point. We want to distribute decision making power and influence to communities, constructively challenging existing power bases (including our own power base as funders) and establishing priorities for action together with communities. We are on a journey with places and learning together. Figure 1 sets out our core values and principles.

Figure 1: core values

Our core values and principles

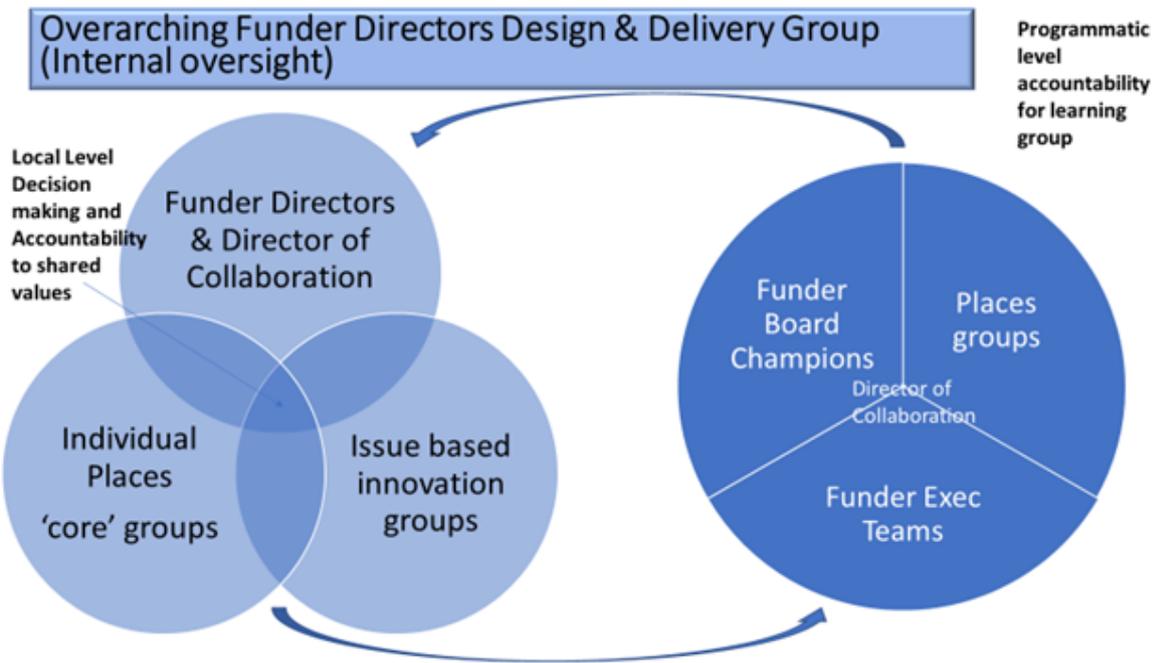


Our approach to creating transformative change is one of bringing diverse perspectives together, understanding the structural forces at play in a place and what it is about our thinking that supports those forces to persist.

Appendix 1 sets out an overview of the emerging ideas that places would like to work on and gives an overview of how we feel the initiative is progressing.

We are clear that this work is grounded in systems thinking. It is operating in dynamic local and national contexts and aiming to disrupt siloed working and create collaboration. We would like to take a live learning or real time approach to using what we are learning to shift thinking and practice in the six places *and* within the funder sector. As such we require a developmental, systems aware, evaluation approach that can support innovation and inform us where we need to change our practice, in places and in the LocalMotion funders, based on what we are learning.

As well as building core groups in each of the six LocalMotion places we have begun the process of building relationships across places. We have run a series of topic-based learning sessions and set up a twice a year learning and knowledge exchange session for funders and people in the places (beginning in November 2021). This work has been supported by our current learning partner for the discovery phase of work. We are happy to make all learning partner reports for the discovery phase available to the successful contractor. Figure 2 sets out the current 'architecture' around the LocalMotion initiative.



Our goal for this work

We want to share more widely what we are learning and create our shared story of *what is possible* when we come together to collaborate around our strengths and build transformative change around shared objectives.

We would like to create a collegiate learning and knowledge exchange framework, rooted in action, that reaches across the six LocalMotion places and funders, but also beyond, to build a network of people who can champion each other, provide constructive challenge, and celebrate learning together.

We would like our learning and knowledge exchange approach to be future focused, proactive and transparent; inspiring the enthusiasm and creativity that will maintain momentum and reinforce commitment as this challenging work develops.

What we're looking for

LocalMotion wishes to recruit a dynamic and creative learning and knowledge exchange partner that is experienced in developmental evaluation and understands the complexity of systems change dynamics. We are open to proposals from individuals, organisations or collaborations who best meet the requirements of the brief.

Central to this initiative is working with a variety of local partners in the six places, and the six funders, as we work together to test shared solutions to common challenges, learn from our approaches and develop a collaborative and co-designed road map for future change to submit to funders in 2023.

We would like the learning from the project to be co-created, shared with and useful to the communities that we work with. We expect it to highlight the learning on how places and

funder practice might operate differently in the future to tackle the root causes of social, environmental, and economic injustice, in collaboration with communities.

We expect the successful learning partner to work closely with:

- the Director of Collaboration
- the organisation or individual we recruit to support us with communications and the development of our brand
- the six funders (primarily through the Design of Delivery Group made up of six Directors, one from each funder) and
- the core groups in the six places.

This developing initiative is being co-created with local places who are at different stages in their existing approaches to collaborative working. The successful learning partner will need to be sensitive to this 'real world' dynamic.

Our key questions

The overall success of this 2-year development phase of the LocalMotion initiative will be considered and assessed against two key questions:

1. What is becoming possible, and why, in the six local places as a result of putting the funders collective resources together with local partners?
2. How successfully is power being distributed as a result of the initiative - between funders and the six local areas, and within/across the groups who participate from the local area.
 - a. And what mechanisms and approaches are proving most promising (and what barriers are proving most insurmountable) for communities in this regard?

Key desirable qualities

The qualities we would like from a successful contractor are:

- A creative person, team or organization that inspires enthusiasm and is comfortable with ambiguity and open dialogue
- An ability to work with complexity and communicate nuance simply, including experience of developmental evaluation and systems change; together with an ability to analyse and clearly present complex information and judgments in ways that are clearly understood by a variety of audiences
- The ability to reveal and make visible the tangible/explicit and the intangible/implicit - for example beliefs, worldviews, assumptions, power, and unwritten rules
- A proven willingness to collaborate, and to create space for both quieter and disruptive voices to contribute to learning and knowledge exchange (including potentially providing channels for the voices of local people in the six areas)

- A willingness to give powerful feedback and radical challenge in creative ways that will help this collaborative initiative to flourish
- A self-starter or team who can hold their own, and their nerve, on a dynamic initiative and who is open to more radical, collaborative, and participatory approaches
- Strong facilitation, listening and interpersonal skills
- Ability to ask difficult and timely questions and take a supportive, coaching approach where necessary.

Key aspects of the brief

The role we need the successful contractor to play is:

- Development and oversight of our learning and knowledge exchange approach for this development phase using a collaborative, open and networked type approach
- Working with the initiative wide (ie all six places and six funders together) and the local or individual place level on learning (potentially including supporting skills development for people, for example, participatory or peer led approaches)
- Building trust with the LocalMotion funders (and where appropriate their relevant specialist teams), local partners and other key stakeholders
- Adopt a coaching role when appropriate, acting as a critical friend and sounding board during the learning journey to the LocalMotion team (i.e. the Director of Collaboration, the Design and Delivery Group and the Communications support partner) and local partners; and being prepared to support, probe, celebrate and challenge accordingly.

Expected Deliverables

The deliverables we would like from this learning and knowledge exchange support are: a co-created learning and knowledge exchange approach and plan for learning at the initiative wide (both funder and local level) and local levels. To include the following considerations:

- Capturing real time progress, stories and learning points (including any relevant metrics to measure progress and successes - mindful that all learning, including 'failure', is helpful)
- Providing regular reports on learning with a view to sharing with the LocalMotion collaboration, local areas co-designing the initiative and possibly more widely where appropriate and agreed with LocalMotion partners (details to be agreed with the successful contractor – we anticipate a minimum of a final report in year 2 and 3 interim reports during the contract and our expectation is that these would be publicly available)
- Creative and informative knowledge exchange and progress reporting platforms/approaches that are agile, real time and light touch rather than burdensome and that give voice to places

- Facilitating twice yearly learning sessions with people from the six places and the six funders that enable us to learn, generate ideas and make decisions on what we need to focus on for the future
- Ad-hoc learning session events on core skills or topics emerging from the work that are relevant to local places objectives across the six places (for example we are recurrently running a session on creative co-production)
- Working closely with the communications lead so that any website and shared platform development to capture progress, share learning and promote dialogue with potentially both a public and private facing space supports our learning approach.

How we will work with you

The successful contractor will work closely with LocalMotion's Director of Collaboration, Kathleen Kelly, who will manage this contract^[1]. They will also meet regularly with the Design and Delivery Group team of six Directors^[2] (one from each of the funding organisations), as well as with local places core groups which involve around 10-20 people in each place^[3].

LocalMotion is also recruiting a contractor to support our branding and communications approach over the same time frame. We would expect the branding and communications and learning and knowledge exchange contractors to work closely together so that we maximise the impact of what we are learning.

LocalMotion is governed by:

- ❖ Local core group meetings of cross sector organisations (including LocalMotion's Director of Collaboration and one Director from a LocalMotion funder) who meet monthly or fortnightly to set the local direction of the initiative and make local resourcing decisions
- ❖ Monthly meetings of the Design and Delivery Group which are made up of Directors from the six collaborating funding organisations and the Director of Collaboration and
- ❖ Twice-yearly learning session events with the funder Chief Executives, their interested Trustees, Directors of the six collaborating funders and representatives from the six places (which the successful contractor will be responsible for running).

Budget and Timeline

This contract for services is for up to two-years to support LocalMotion's development phase. We would expect the contract to begin around 1 January 2022 and end on 31 October 2023.

We expect that the successful contractor will be an embedded member of the LocalMotion team.

We have allocated a total budget over the two years of £75,000 pa including VAT and any expertise you may want to draw in through partners.

In addition, Table 1 below highlights what budget is available for events, including: any speaker costs, and support for people to be able to participate such as caring costs for example, plus travel and subsistence for speakers and attendees. We are open to contractors changing budget between headers if they feel that will deliver better outcomes. Table 1 sets out the total budget for this work. The costs of a website and learning or knowledge exchange platform are in a separate budget.

Table 1: Learning and knowledge exchange costs

	Yr1	Yr2	
Learning costs sub total inc any VAT	126,250	137,000	263,250
Learning partner	75,000	75,000	
Carer attendance costs for carers/parents for working groups/local events	1,250	2,000	
National learning events, bringing places together + conference in yr. 2	50,000	60,000	

Our assumption is that the twice-yearly learning events will be held face to face, subject to any public health restrictions. We are open to electronic, blended and face to face approaches for all other meetings. We are happy to discuss spend profile and budget headers with the successful contractors.

Submitting your proposal

LocalMotion welcomes initial expressions of interest for this role **by 5pm on Friday 3rd December 2021**. Your response should be no more than 10 pages, to include:

- ✓ Your understanding of the principles and overall approach to this role and how you would make the most of the opportunity it presents
- ✓ Practical experience of undertaking ‘action based’ and developmental learning and knowledge exchange work of emergent and complex systems change, including links to publicly available learning and/or evaluative outputs where possible

- ✓ Your ability to clearly communicate complex information and judgments in both creative and non-creative ways that are clearly understood by a variety of audiences
- ✓ What your approach would be to working as part of the LocalMotion team as a critical friend – where do you see potential tensions or ethical considerations, and what limits to the role do you think are key to maintaining an evaluative viewpoint?
- ✓ How you would manage and mitigate key risks
- ✓ Your thoughts on the proposed approach or the brief
- ✓ Please cost different elements of the brief separately as far as possible
- ✓ Short CV(s) of the proposed project team, including day rates where applicable. These day rates will be applicable for the life of the project.

Please submit your proposal via email to: helen.taylor@localmotion.org.uk by 5pm on Friday 3rd December 2021.

Evaluation criteria and the tendering process

Proposals will be evaluated against the following criteria:

- ✓ Your proposed approach to the brief
- ✓ Experience and expertise in using creative developmental and systems thinking tools for emergent and dynamic programmes across multiple local sites
- ✓ Experience of connecting with a diverse range of people in a community, and engaging with them where they are at
- ✓ Understanding of place-based working, systems change and/or power dynamics
- ✓ Clarity of communication including the ability to analyse and clearly present complex information and recommendations in both creative and non-creative ways that are clearly understood by a variety of audiences
- ✓ How you will manage risk and opportunities within your approach to adaptive learning

We welcome expressions of interest from organisations, individuals or collaborations with experience of evaluating place-based initiatives and/or locally rooted asset-based community development approaches that take a developmental and/or systems change evaluation approach.

Following a desk review of expressions of interest, we will invite a maximum of three providers from the proposals stage to deliver a 45-minute workshop with the Directors from the six foundations (likely to be via zoom).

We will advise organisations if they have been shortlisted for the workshop assessment stage by end of Friday 17th December 2021.

The workshop assessment stage will then take place w/c 10th January 2022. For the session we would like you to demonstrate how you might draw out learning, using a developmental or systems thinking approach, as part of a facilitated discussion. Two weeks ahead of this session, we'll provide a more detailed pack of information about LocalMotion progress to inform your workshop design.

If you are selected to attend the workshop-based assessment, which we would expect you to facilitate, we are happy to pay reasonable costs for the preparation time on this task at a daily rate cost of £400 + VAT to cover preparation and delivery of their workshop.

A decision on the successful contractor will be made following the final workshop assessment date.

For the workshop assessment stage of the tender process, i.e. the 45-minute learning session facilitated by you, we are interested in:

- ✓ The kinds of activities you lead on to facilitate adaptive learning as part of a developmental or systems change evaluative approach
- ✓ Your ability to operate as a critical friend as part of the learning partner role, offering constructive challenge and encouragement
- ✓ Your sense of the interpersonal dynamics in the room
- ✓ Your suggested direction of travel for the LocalMotion initiative's learning approach.

[1] Frequency and during of contact of meetings to be determined with the successful contractor

[2] We anticipate meetings approximately once a quarter with the Design and Delivery Group and the successful contractor, for a maximum of 2 hours per meeting. This would include the twice-yearly learning events

[3] Frequency of any meetings beyond the twice yearly learning sessions to be co-designed with the successful contractor as part of the learning plan they develop
