

Better Lives

Strategy 2021-24



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Introduction

These unprecedented times underline our biggest strategic challenges and opportunities. Covid-19 is showing us how critical it is to support communities to stay healthy, well and resilient. The pandemic has shone a spotlight on health inequalities. It is our job, as an ambitious community health and wellbeing specialist working in some of England's most challenged communities, to help overcome these inequalities.

We can do this. Our response to Covid-19 has proved that we have the ability and agility to support a much higher number of people in community settings in new and efficient ways. The challenge is to do this more effectively and in more locations.

Our strategic context is clear. The NHS Long Term Plan, the Forward View, and the NHS People Plan, all coupled with Covid planning, point to a future in which health organisations must work not just as providers, but as joint or 'integrated' enablers. We must support people to maintain their health and, wherever possible, avoid the long-term conditions that lead to hospitalisation, reduced life expectancy and impaired quality of life.

Our future vision of Locala as a health and wellbeing organisation is consistent with this. We see ourselves collaborating imaginatively with partners across the health and care spectrum, from our hospitals through to the tiny informal groups that help to determine health outcomes in every community.

This is informed by our common purpose: the pursuit of Better Lives for those in our communities. We will be outstanding in everything that we do so that all of our activities help the people we serve to live Better Lives.

We will forge a reputation for Locala that our patients, partners and the public trust. They will be proud to have Locala operating in their community. A name change to Locala Health and Wellbeing is part of this drive to increase awareness of Locala, enhance our reputation, and build the integrity and power of our brand. To achieve this, the strategy will be supported by a new communications ambition.

Our strategy focuses on what makes us different. It aims to make the most of the fact that we are an employee-owned social enterprise. Our colleagues have a say in the way we are run and how we work,

whilst our common purpose means we invest heavily in the wellbeing of our communities. Colleagues, patients and communities are represented by our Members Council who take a key role in delivering the strategy.

Locala is currently well-positioned in Kirklees and nearby areas, with a deeply committed workforce, patients who think highly of our services and a recent 'Good' rating from CQC. These all reflect the upward trend in performance that the organisation has achieved.

However, this does not mean we are without some fundamental challenges as a provider. Locala remains relatively small in health economy terms, being highly localised to Kirklees and its adjacent areas. Contractually, this leaves too many eggs in one basket and increases our vulnerability to any future rationalisation of health and care services locally. Furthermore, our core community services are not yet built to improve radically the wider determinants of health. In essence, the value of what Locala brings to the health economy, above and beyond our contractual requirements, is not yet sufficiently clear to partners, whilst our visibility within the community is lower than we would like.



So what is the future to which we aspire? We see the Locala of the next few years as an indispensable ally to other players in the health and care systems where we operate.

This requires, going forward, that we approach everything we do in a spirit of collaboration. We must be known as brilliant partners in the system, a key piece in a much bigger jigsaw made up of our acute and primary care partners, local councils and third sector organisations and, ideally, a piece that helps the other parts of the jigsaw function better together.

To get to our future position, we have identified five Strategic Priorities.



Most importantly, we will provide **Exemplary Care**. This sees us moving from where we are now (CQC 'Good'), to offering the highest standards of clinical care, rehabilitation and support to our patients, service users, carers and families, by becoming CQC 'Outstanding', as well as gaining other national beacon awards for the quality of our services. We will provide greater personalisation of care, and be a far better population health partner based on the effective use of health data and insights derived from it.

Key to achieving Exemplary Care are four other Strategic Priorities.

First amongst these is our desire to become an **Employer of Choice** in order to attract and retain an excellent workforce. Central to this is building a modern and progressive culture. To this end, we will invest in creating a more entrepreneurial and non-bureaucratic culture characterised by high levels of employee engagement and empowerment.

Second, we will **Grow through Partnerships**. Over the next three years, we will expand Locala's presence both in new geographies and in breadth of services through partnerships, collaboration and integration. Our proposition will be based on the quality of our existing services and our ability as a social enterprise to add complementary services that contribute to improving lives in our communities. In doing so we will both grow and diversify our income, reducing reliance on a small number of contracts.

Alongside Growth, is the need for **Sustainability**, both financial and environmental. Through more efficient use of resources we will improve our productivity and profitability, which in turn will enable us to invest more in the development of new services and our Social Impact activities. In addition, we will take significant steps towards 'net zero' emissions.

Finally, we are making the step from relatively unmeasurable social value spending to more targeted **Social Impact**. We will invest in verifiable and significant positive social impact outcomes that contribute to our delivery of Exemplary Care. These projects will focus on social isolation, the aspirations of young people, and improvements to the effectiveness of and integration within Primary Care Networks (PCNs).

Underpinning our Strategy sit three Strategic Enablers, themes which run through all five Strategic Priorities.

- **Partnerships:** seeking to collaborate in everything that we do, both internally and externally, working hand in hand with patients, service users and carers, as well as our commissioners, acute partners, PCNs, local councils and third sector organisations.
- **Innovation:** delivering the continual advancement and improvement of our services and ways of working to increase the personalisation of care and improve efficiency.
- **Research and Development (R&D):** through strong external research and development partnerships, and research into population health, we will improve our clinical and operational effectiveness.

Our Values

Colleagues have worked together to refresh our values to drive forward this Strategy.

We believe that collective culture and behaviours are central to delivering this Strategy and that our values must evolve, whilst retaining the essence of what we have created together. Everything we do will be rooted in, and driven by, our values.

These values will be shared regularly across the organisation and beyond, they will inform hiring decisions and they will be integrated and modelled in organisational activities. Behaviours that demonstrate them will be celebrated and rewarded.

First and foremost, we will continue to be caring. Our credentials as a caring organisation will be demonstrated through every interaction people have with us and in the way we respect and treat each other. Care will be felt by the people who use our services, the wider community, colleagues, partners and commissioners.

Second, we will be ambitious. We will be ambitious in the quality of care we provide, in the outcomes we help people to achieve, for our colleagues and for the growth of the organisation.

Third, we will be part of it. We will be participators and collaborators, not spectators. As an employee-owned social enterprise, we will work with colleagues and partners to speak up and bring change to benefit each other and our communities. Growth and innovation will be driven, not from the top, but from the front line.



BE CARING BY

- Offering brilliant customer service, looking after the whole person
- Being respectful and inclusive of all communities and cultures
- Giving exceptional support to all of our teams



BE AMBITIOUS BY

- Providing outstanding care every single time
- Improving our services through re-design and leading-edge technology in partnership with service users
- Seeking opportunities to reach more people, more communities and improve more lives



BE PART OF IT BY

- Serving our communities to build better health for everyone
- Working together to win together, with colleagues and partners
- Speaking up and using my voice, ensuring ideas from all parts of the organisation are heard

By 2024

This new Strategy for Locala Health and Wellbeing will define our path for the next three years.

We will successfully deliver every main component of the Strategy.

By 2024, when this Strategy has been implemented, Locala will have become and have a strong reputation for being:

- **A provider of very high quality care, health and wellbeing services;**
- **A first class population health partner, much better integrated into the local health economies in which it operates;**
- **A learning organisation that asks for, and listens to, the voice of service users;**
- **A fast paced organisation with a values driven culture of empowerment, innovation and entrepreneurialism;**
- **A company employees enthusiastically want to, and compete to, join and stay in;**
- **An organisation that adds unique value in all that it does because of its status as an employee owned social enterprise;**
- **A business that is growing at scale into new markets and geographies;**
- **A highly efficient organisation which continually improves its productivity in front line delivery and across the internal support services;**
- **A role model in the use of technology, research and data;**
- **An astute social impact investor achieving measurable social impact outcomes; and**
- **A much more significant contributor to planetary sustainability.**

Locala Health and Wellbeing will hold itself to account for the delivery of this new Strategy by constantly testing progress towards these indicators of success.

Our Strategic Priorities



1. Exemplary Care

What we are trying to achieve

This Strategic Priority is to transform Locala into an exemplary provider of community services delivering outstanding quality, personalisation of care, and a positive experience for service users at every contact. We will improve both the health of our community and the way in which we are seen as a service provider and partner.

Having secured a rating of 'Good' from the Care Quality Commission in 2020, we will continue our improvement journey to 'Outstanding'. We aspire to ensure all patients, service users, partners and commissioners see us operating consistently at this benchmark and we intend to achieve beacon awards beyond our CQC rating. As a provider of health and wellbeing care from preconception to death, we will continue to build exemplar status in all our specialisms, including in our: 0-19, district nursing, dental and sexual health anchor services.

Our colleagues are key to delivering Exemplary Care. Meeting the needs of our workforce and providing the opportunities and support for them to thrive, with clinical leadership at all levels, is an integral part of this Strategic Priority.

To underpin our care and rehabilitation services, we will create a Quality First Accreditation Framework. Quality First will enable collective leadership of clinical delivery and professional standards, driving continuous improvement in the quality of service delivery, patient outcomes and colleague experience in all our teams and services.

Quality First will be underpinned by Our Locala Way for Quality Improvement (Qi) methodology to ensure best practice is widely shared, and we continue to build on areas of success and innovation already identified within the organisation.

We will continue to build upon our reputation for seeing and treating service users as individuals. We will work with them to co-produce an agreed personalised care and support plan, leading to a smoother journey through services, better integration at points of transition and greater continuity of care. We will maximise

the independence of individuals from the point of referral. Patient experience and involvement will be central to the delivery and development of all services, with patients as equal partners, actively listened to and involved in line with Locala's aspiration to be an inclusive employer and provider of services.

We will be an active population health partner in the areas we operate, with population health insights helping to guide and inform all of Locala's existing public health, wellbeing, care and rehabilitation activities. Our future health and wellbeing services will also be shaped by population health intelligence and research evidence. We will work in even closer partnership with PCNs, local authorities and health commissioners. Together we will deliver outstanding services to improve patient outcomes and facilitate Better Lives.

Our investment in innovation will focus on personalisation of care and the use of data and digital methods. Bringing together Our Locala Way for Qi methodology, with leading edge IT enablers, we commit to improving our services to ensure that they are at the forefront of personalised and empowered care. We will work through both traditional and digital channels to help people and communities author their own care and support. We will focus investments on digital and technological advancements that enable us to understand population health trends and help people manage their own conditions. This is not just about buying laptops and gadgets, but rather using technology and data together for a better patient and service user experience.

New partnerships with universities, leading healthcare providers, and technology partners will support R&D, allowing our communities to benefit from the latest advancements. We will improve our clinical and operational effectiveness through the participation in, and publication of, research. We will adopt a systematic method for trialing and evaluating new initiatives and ways of working resulting in improved population health and patient outcomes. Innovation will be captured so that it can be shared through the organisation, exported further afield and translated into other settings.

How we will achieve it

1. We will empower colleagues to deliver 'Outstanding' personalised care through the implementation of our Quality Strategy.
2. We will establish Locala as an effective population health partner with PCNs, Local Authorities and health commissioners to inform and shape our current and future priorities to address Health Inequalities.
3. We will improve patient, service user and carer experience will be enhanced by embracing innovation and the use of digital technology.
4. We will improve care delivery through enhanced clinical research, working with partners and building evidence based knowledge and practice publishing findings locally and nationally.

How we will measure success

We will have successfully delivered this Strategic Priority if, by 2024, we have:

- **Achieved an overall rating of 'Outstanding' by the CQC;**
- **Received national beacon awards for the quality of our services, such as the Nursing Times Awards and the HSJ Patient Safety Awards;**
- **95% of service users say Locala's services are good, or very good in the Friends & Family Test (FFT);**
- **90% of colleagues recommending Locala as a service provider, as measured via the Colleague Survey.**

2. Employer of Choice

What we are trying to achieve

This Strategic Priority is for Locala to be consistently recognised – both internally and externally – as a leading employer that attracts and retains colleagues. Recognising the competitive marketplace, we aspire to make Locala the number one choice for existing and future employees. As an employee-owned social enterprise Locala puts the interests of colleagues at the forefront of how it is led, managed, run and developed. We believe that an engaged workforce will lead to a better patient experience.

To achieve this Strategic Priority, Locala will be an entrepreneurial organisation, with high levels of employee engagement and empowerment. This will be reflected in our care for colleagues, our fast track professional development, our innovative practice and our meaningful social impact.

We will prioritise the care we take of our colleagues and their wellbeing. Through our extensive wellbeing programme we will enable, support and encourage colleagues to build their resilience and to adopt healthy lifestyle choices. This in turn will enhance our ability to deliver exemplary patient care.

We will be a skilled organisation, where we invest in the skills and competencies of our existing workforce and bring in new skills and capabilities at all levels, including at the Board. We will recruit from diverse pools, across a full range of geographies, schools, colleges, and universities. We will increase the number of apprenticeships and provide support for students seeking to join us in nursing and across the organisation.

We aspire to be a diverse organisation, able to understand and address the unacceptable health inequalities that exist in the populations we serve. We will harness the diversity and strengths of all colleagues and our diversity at all levels including the Board will become much more representative of the communities we serve.

Locala will also be a growth focused organisation. We will be a place where colleagues are able to chart their path through fulfilling, rewarding and enjoyable careers. Major investment in education, training and development will support colleagues to achieve their individual professional goals, whilst transparent and flexible career progression frameworks will exist for all major professional areas (clinical and non-clinical). Fast track routes will be opened up for those who merit them. Leaders and emerging leaders will be supported through tailored training and development opportunities. Rotational posts and secondments (both internal and external) will allow colleagues to move through the organisation to develop deeper knowledge and experience. We will retain and improve the level of our Investors in People (IIP) accreditation, demonstrating the organisation's commitment to realising the potential of its people.

We will be a listening and streamlined organisation. As an employee-owned social enterprise, colleagues will be encouraged to contribute to decisions that impact them and their services. Clear channels of communication will ensure that every voice is heard; and we will encourage and facilitate colleagues to act as ambassadors of the Locala brand. We will invest to allow colleagues to innovate and explore alternative ways of working to improve services for patients and service users, and to develop expertise in Our Locala Way for Qi methodology. We will reduce unnecessary bureaucracy. Simplifying how we make decisions, increasing management delegation, giving greater autonomy to colleagues, and embracing agile working practices (whilst always ensuring patient safety), will enhance not only the colleague experience, but patient and service user experience too.

Finally, we will be a community focused organisation, united by our common purpose of enabling people in the communities that Locala serves to live Better Lives. All colleagues will have the opportunity to participate in, contribute to, and see Locala's social impact in their communities.

How we will achieve it

1. We will build a modern and progressive culture to deliver our strategy.
2. We will ensure the organisation has a highly effective recruitment system and processes to manage capacity.
3. We will work towards having a workforce that represents the diversity of the communities we serve, including in senior appointments.
4. We will invest in education, training and development to support all colleagues to enhance their professional capabilities, including in leadership, through a suite of tailored training and development opportunities, expanding the use of coaching and mentoring.
5. We will create transparent and flexible career progression frameworks and pathways for both clinical and non-clinical employees.
6. Continue to develop opportunities to enhance overall colleague experience and their engagement with the organisation and particularly those benefits of Locala being a social enterprise that can set us apart from other health providers.

How we will measure success

We will have successfully delivered this Strategic Priority if, by 2024, we have:

- **Retained and improved the level of our Investors In People accreditation;**
- **80% of colleagues recommending Locala as a place to work as measured via the Colleague Survey;**
- **Improved overall employee engagement, as measured via the Colleague Survey;**
- **Reduced vacancies in the workforce by 50%;**
- **Significantly reduced turnover generally and particularly in the highest turnover parts of Locala's workforce;**
- **Quality of external applications for roles in Locala evidenced through shortlisting mechanisms;**
- **Achieved a mix of employees across the whole organisation, including the Board, that better represents the diversity of the communities we serve;**
- **Secured external recognition as an excellent values rich employer through relevant awards.**

3. Growth Through Partnerships

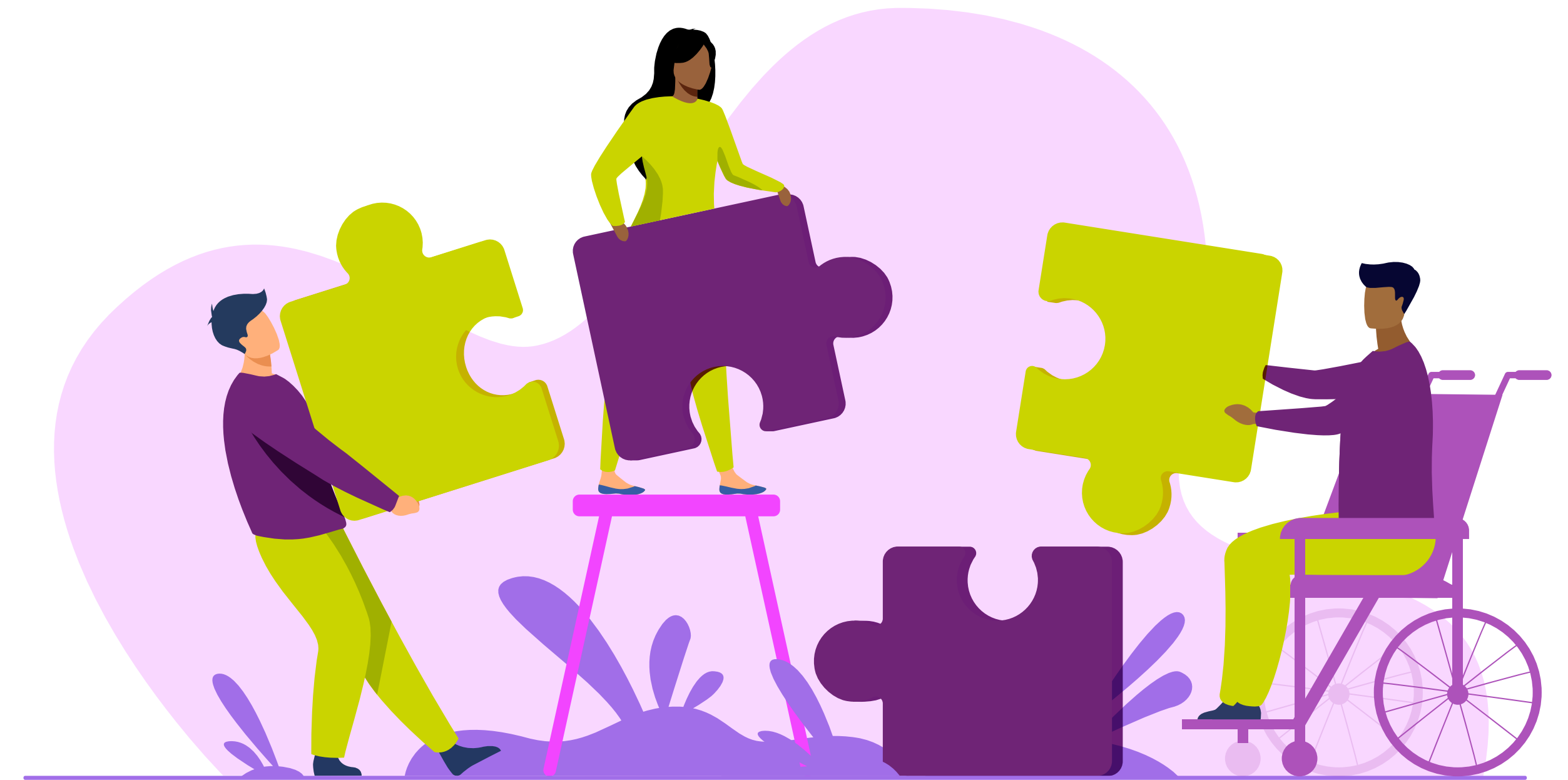
What we are trying to achieve

This Strategic Priority is to grow and diversify our income, expanding our reach both geographically and in breadth of services. Through deeper partnership working and commissioner relationships, as well as broader commercial opportunities beyond the NHS, we will grow and diversify our revenue more quickly and sustainably than before through collaboration and integration.

This Growth agenda will allow Locala to contribute more to our common purpose. Increasing the reach of the organisation will help more people achieve Better Lives. A bigger Locala will have greater influence. It will also give us new economies of scale, so that we can make better use of our resources. Furthermore, expansion and diversification will enable us to reduce Locala's reliance on a small number of contracts from a limited range of commissioners. Service users will be at the heart of our decision making.

Commissioner behaviours are changing. There is an increased desire on their part for longer term strategic partnerships, supported by the proposed NHS White Paper (2020) and new procurement regulations. Tender opportunities are reducing, particularly in social care. We have strong relationships with our local commissioners, which form a firm platform on which to build. We will therefore focus more heavily on partnerships and alliance building, helping to shape demand as well as becoming a supplier of choice in new geographies and service areas.

We will also look to acquire a number of high potential health and care businesses in new localities or complementary services to benefit our existing service users. We will expand into new geographic areas which will enable us to enhance the quality of existing services and partnerships. We will use digital tools and solutions as appropriate.



How we will achieve it

1. We will strengthen the commerciality and networking skills of the senior team, revising roles to ensure more senior people are externally focused, with greater ownership of revenue growth targets.
2. We will seek opportunities for new contracts with Locala's current commissioners.
3. We will identify opportunities to expand our existing services into new geographic areas.
4. We will identify complementary services that will support our pursuit of Exemplary Care and establish a presence in the broader health, wellbeing and social care sector.

How we will measure success

We will have successfully delivered this Strategic Priority if, by 2024, we have:

- **Reduced by 18%, to 53%, our current dependency on our two largest contracts for external income, excluding the funded use of subcontractors;**
- **Grown our total annual income by 30%, excluding the funded use of subcontractors;**
- **Secured income from new services and in new geographies.**

4. Sustainability

What we are trying to achieve

This Strategic Priority is to ensure that Locala is a financially sustainable organisation, along with being a much more significant contributor to planetary sustainability. Locala will contribute to a clean and healthy environment. Sustainability covers environmental, social and economic aspects. We expect progress under this strategic priority to have beneficial effects on social and financial sustainability.

We will provide excellent value for money that never compromises on the quality and safety of the care we deliver. In the current financial environment, and as we grow, it is essential that we remain financially resilient, particularly given the increasing requirement to do more with less.

As a social enterprise, we believe in improving lives by investing all of our resources into our local communities. Any surplus generated enables us to invest more in direct service delivery and additional activities that help to improve lives. Up to 50% of our annual surplus will go directly into Locala's Social Impact programme. To achieve our common purpose of Better Lives, we must have a much greater emphasis and more importance attached to operating more sustainably than we have before.

We will optimise existing costs in front line services, as well as the internal support services, to deliver efficiency savings. In addition, by growing the business whilst at the same time controlling costs we will reduce the proportion of our expenditure that is not on front line delivery. As part of reducing costs, we will invest in improving productivity through different ways of working, including the use of technology, reducing meetings and improving colleague engagement with patients and each other. Our Locala Way for Qi methodology will be key to driving continuous improvement in patient experience, optimising costs, improving productivity and in turn increasing sustainability. We will make the most appropriate use of estates (including Locala's estate, the wider public realm estate and the estate of non public sector partners), to ensure they serve colleagues' ways of working and support better patient outcomes.

Financial investment will play a key role in achieving our Sustainability aims. We will astutely invest in each Strategic Priority and Strategic Enabler within this Strategy. The details of this approach are set out in our Business Plan.

Furthermore, we will put environmental sustainability at the heart of our organisation. We will take significant steps towards having 'net zero' carbon emissions. By delivering care in a more sustainable way and supporting colleagues and patients to live more sustainable lifestyles we will enable better health outcomes and Better Lives in our communities.



How we will achieve it

1. We will optimise costs across our front line services and internal support services, prioritising those that are currently the least financially sustainable.
2. We will improve productivity to enable us to do more for our patients and service users through new technology and innovative service redesign.
3. We will improve the use of estates to ensure the profile and capacity is appropriate and effective for colleagues' ways of working and better patient outcomes.
4. We will take significant steps towards 'net zero' carbon emissions, through better use of technology, estates, medical devices, and consumables.

How we will measure success

We will have successfully delivered this Strategic Priority if, by 2024, we have:

- **Increased productivity and delivered efficiencies in front line services;**
- **Reduced the current cost of internal support services and reduced the proportion of our expenditure that is not on front line service delivery;**
- **Achieved year on year improvement in annual net profit in order to maximise investment back in to the Better Lives agenda via investment in Locala's direct service delivery and Social Impact programme;**
- **Received independent recognition for the effectiveness of our financial management (via a KPMG, or similar award);**
- **Reduced our carbon emissions and be on target to achieve a net zero footprint by 2040.**

5. Social Impact

What we are trying to achieve

This Strategic Priority is for Locala to build a reputation as a community organisation, recognised for its Social Impact. We are making the step from relatively unmeasurable social value spending to more targeted social impact investing. We are therefore establishing a bold new approach where we invest in verifiable and significant positive social impact outcomes that contribute to our common purpose.

The key criterion for the investments Locala will make in its Social Impact activities will be initiatives that directly or indirectly support the achievement of Exemplary Care and therefore contribute to Locala's common purpose of achieving Better Lives for people in the communities Locala operates in.

As a social enterprise, Locala is able, in a way that other providers are often not, to create social impact that enhances its delivery of Exemplary Care. This in turn makes Locala a better partner in achieving public health outcomes. We will commit up to 50% of Locala's annual surplus to Social Impact activities.

We will work in partnership with our communities, building on community assets and local knowledge. Close working with local councils will be of pivotal importance. We will continue to support community organisations through the Locala Community Fund. We will develop and lead a small number of large scale community projects that are supported by a range of Social Impact activities across the organisation. These projects will focus on reducing social isolation, supporting the aspirations of young people and improvements to the effectiveness of and integration within Primary Care Networks.

We will embed Locala into the social fabric of the community by facilitating support between PCNs and third sector organisations. Initiatives will be identified and prioritised using population health data from the Joint Strategic Needs Assessments (JSNAs) and knowledge from local communities. We will provide our expertise, support and resources to develop plans, tailored for each PCN we collaborate with, to reflect their different priorities and needs. As a result, we may therefore pursue different projects and themes with different PCNs. This work will complement and support services that we deliver and by focusing on prevention it will deliver better health outcomes.

Our common purpose of Better Lives for our communities is a huge driving force for Locala colleagues, many of whom are already involved in charitable activities alongside their employment. As such, we will make it easier for colleagues to volunteer in Social Impact activities. These opportunities will be linked to service provision, working with community organisations, as part of a "giving back" programme of work.

How we will achieve it

1. We will work with Primary Care Networks, informed by population health data, to understand the local health and social care needs and together with the voluntary sector anchor organisations establish initiatives to improve integration and effectiveness within Primary Care Networks.
2. We will invest in a small number of high impact projects that reduce inequalities with a particular focus on reducing social isolation and supporting the aspirations of young people.
3. We will make it easier for colleagues to volunteer with community organisations that contribute to our common purpose.

How we will measure success

We will have successfully delivered this Strategic Priority if, by 2024, we have:

- **Improved integration and effectiveness within PCNs;**
- **Enabled at least 1,500 socially isolated people to access a new regular activity, or interaction;**
- **Supported the aspirations of at least 1,500 young people through our high impact projects;**
- **Received independent external verification (such as B Corporation certification) for the outcomes achieved by our Social Impact activities, including our work through the Community Fund;**
- **Increased impact through our colleague volunteering programme.**

Better Lives

Strategy 2021-24

Locala Community Partnerships CIC

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