



# Locala Health & Wellbeing 2024-2027 Strategy



Full version

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# 1. Introduction

Our THRIVE Strategy is built on the strong foundations created by our Better Lives Strategy 2021-24.

## Where we are now

Through our 'Better Lives' Strategy, delivered between 2021 and 2024, we made great strides in supporting those in our communities to maintain their health and improve their quality of life, as illustrated by our patient and family scores.

We are providing more services to more people and communities, including the expansion of our sexual health services into Greater Manchester, our self-care support and our outreach work into communities through our clinical van. As an employer, our engagement scores continue to rise, with Locala colleagues now the most engaged of any provider in the region<sup>1</sup>. Crucially, we have successfully retained our largest community services contract which provides us with significant stability for the next strategic period.

However, 'Better Lives' set a number of ambitions in which we have not made the progress we wanted, most notably in the ambition to grow and diversify our income, reducing our reliance on our two major contracts. Alongside this, we were not able to generate the level of surplus that would make other elements of the strategy possible, including advancements in digital technology and to address health inequalities. At a workforce level, in line with national trends, our turnover and vacancies remain high, and the diversity of the organisation, particularly at senior levels, has seen little movement.

<sup>1</sup> Locala recorded the highest staff engagement score in W. Yorkshire ICS (7.3 vs a range of 6.5-7.1) and the highest staff morale score (6.22 vs a range of 5.7-6.2).



## External environment

**As we look forward to 2027, our common purpose remains: the pursuit of better lives for those in our communities, supporting people to THRIVE where they live.**

The context is changing, but it is no less demanding. We have an ageing population and the communities we serve are among the poorest in the country. High cost of living, rising health inequalities and increasing pressure on acute services are preventing people and communities from thriving where they live.

The capacity of the system is under increasing strain, and the recruitment of clinical staff remains a national, as well as local, issue. Our colleagues are intrinsic to our ability to provide outstanding care, and to attract and retain a high-quality workforce, Locala must continue to be, and be perceived as, an excellent and highly desirable employer. This will require us to take a longer-term view, particularly in our pipeline development. Alongside this, the opportunity for Locala to use digital technology to deliver services more effectively and efficiently has never been more important to a sustainable future.

Supporting people to THRIVE where they live through the provision of seamless care is central to Locala's existence and aligned with the direction of national and local policy. The maturing Integrated Care Systems bring a new dynamic that demands greater collaboration. Success will come to providers who can work skilfully across NHS, local authority, voluntary and community sector boundaries, who can innovate and create measurable health improvements alongside others.



## 2. Looking forward

The need for Locala to grow and diversify remains.

First, to meet the ever-growing needs of our communities; second, to improve our financial sustainability; and thirdly, to enable us to provide the greater opportunities for colleagues and communities that come with scale.

**Sustainable growth** is key to supporting people to THRIVE where they live, and we see opportunity to do this in the two integrated care systems we operate in.

In West Yorkshire, we will build on our strong presence by going deeper into our communities and offering proactive solutions to the wider system, especially where we can use our social enterprise status to be creative and innovative. In Greater Manchester, we will seek opportunities to widen our service provision and reputation to become an established system partner.

Growth may come through publicly funded contracts (NHS and local authority), and we will continue to seek out these opportunities although we recognise with changes to how services are commissioned with the recent introduction of the Provider Selection Regime, there may be fewer over time. We must therefore look beyond publicly funded work and develop self-funded growth at scale by 2027. This is something we have heard from our colleagues, who believe that in the long-term privately funded work should form a substantial proportion of what we do, allowing us to use any surplus from this work to further drive the **health inequalities agenda**. As with our ambition for increased productivity and more agile working, growth through self-funded developments will require a culture shift for the organisation over the next three years.

Successful growth means that we can contribute more through our **social value funding**, putting up to 50% of any surplus back into our communities. Colleagues and stakeholders were unanimous that Locala's social value activities require a **greater strategic focus** moving forward, so we can truly measure and see the impact our work in this area achieves and must **align with ICS priorities for tackling population health inequalities and addressing gaps** in existing provision.

As an independent social enterprise, we possess greater operational, legal and financial flexibility than public sector providers, and these are an essential ingredient to our contribution to a more effective system. However, feedback from colleagues and external stakeholders suggests we are not making full use of this, and more is needed to enable **greater agility and flexibility** in decision making. **Increasing our productivity** and **being a more efficient organisation** will be a key focus of our THRIVE strategy, in terms of how we work, support our people and communities and operate as an indispensable partner. We will need to use technology differently to achieve our ambition around productivity and efficiency, but also embracing the benefits of a **digitally enabled workforce**, skilled in utilising emerging technology to best carry out our work every day.

To deliver our strategic ambitions, we need to think and act differently. We do not always see ourselves as a dynamic, agile social business, rather aligning ourselves with a statutory provider identity. Whilst we are proud to provide NHS and local authority services and work shoulder to shoulder with our system partners, we want to be known as a leading social enterprise and colleague owned organisation, helping people THRIVE in their homes and communities.

Key to all of this is our culture. This means how we behave, how we think and how we act or simply put, 'how we do things round here'. Our culture is based on our values and determines how we feel about our work and how we do it. We have challenged ourselves about shifting our culture to be more inclusive, compassionate and kind, as well as being more efficient, productive and ensuring a safety through learning approach. Getting this right will be integral to our success.



# 3. Who we are

At Locala, we are clear about who we are as an organisation and what we are here to do: **our purpose is to support people to THRIVE where they live.**

**Our mission** sets out our high level vision to achieve this: **Locala provides exemplary, seamless and improving care, reducing health inequalities and the demand for acute services.**

**We partner with others to make the overall system as effective as possible, being indispensable to people, partners and places.**

Caring for people at home or as close to home as possible is at the very core of what we do and who we are. We are passionate about working as a social enterprise and as part of our wider health and care systems to ensure people can have the support they need in their homes and local communities, when they need it.

Our strategic vision for the next three years is built around making this our commitment to every person we support, and we have called our strategy 'THRIVE' to show that this is paramount to all we do.

We are proud of our mission and the unique role we play in our health and care systems. We have developed our THRIVE strategy exactly to deliver our services, our support and everything we do to achieve an inclusive, equitable and impactful experience for every single person and community we serve.

At our very foundation, are **our values, underpinning our strategy and everything we do at Locala**. The decisions we make to deliver our ambitions demonstrate commitment to our values of Be Caring, Be Ambitious and Be Part of It.



## Caring

- 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



## Ambitious

- 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



## Part of It

- 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

# 4. Our strategy

In August 2023, Our Board has agreed statements to represent our ambition for Locala in 2027. Through a co-designed development approach with colleagues, key stakeholders and people we support, these have been grouped into three pillars, with clear priorities and measures of success set around each.



**Firstly, we will ensure exemplary quality of care in everything we do by focusing on better care every day. Central to this will be to:**

- Develop a “safety through learning” culture, by introducing mechanisms to ensure learning is captured and shared
- Be a trauma informed organisation
- Deliver accessible, inclusive and responsive services by expanding the self-care team and improving our use of data and digital tools
- Embed innovation to the core of how we design, develop and deliver services by enhancing our culture of quality improvement and expanding research activities

**Secondly, we will empower our colleagues, ensuring our increasingly diverse workforce is the most inclusive and engaged of any community health and care provider in the areas we serve.**

Locala will be known for its agile and dynamic culture to support our ambition to improve productivity, supporting many more people where they live and ensure our growth ambitions can be met. To achieve this, we will:

- Equip all managers to live up to expectations of a 'Locala Leader'
- Invest in developing our workforce pipeline and significantly increase the diversity of our senior leadership
- Create a culture of belonging
- Be an anti-discriminatory organisation
- Develop our business intelligence capabilities to ensure the business can monitor performance and decisions are informed, particularly assurance to the Board on key strategic issues.
- Significantly improve the productivity of our clinical and support services including implementation of our digital interventions that support patient delivery.
- Ensure our governance is the most effective it can be.

**Thirdly, we will expand our reach to serve more communities, embedding Locala as a leading provider of health and care services across West Yorkshire and Greater Manchester, and tackling the causes of health inequalities. Our priorities within this are to:**

- Reduce health inequalities through targeted action for priority groups, bringing together existing data and activity, coordinated by a dedicated multi-disciplinary team
- Develop and build self-funded services, complementing our existing provision, building on our expertise.
- Become a stronger alliance partner within West Yorkshire, delivering existing contracts and proactively seeking opportunities for greater integration
- Treble the scale of our publicly funded services in Greater Manchester through tenders and partnerships and a dedicated local team
- Explore primary care developments e.g. partnership work, PCN level projects, health hub creation, back office package of support and taking on further GP practices.
- Develop our approach to merger, acquisition and partnership to ensure the strongest, most sustainable future for Locala

When each of the THRIVE pillars come together, we will see amazing things start to happen. Our THRIVE delivery model below offers a high level visual of how this will happen, showing how through our growth ambitions to be more enterprising and develop self funded options for those who can afford it will allow us to use any profit to go back into our communities and provide the means to deliver social impact where it is most needed, addressing health inequalities through this vital work. This is all balanced through our established and essential publicly funded work, which offers expertise and experience to help build new ideas into thriving new service offers.

Our integrated business plan and budget will set out the ‘how’ we will deliver our ambitions and strategy for each year, with clear measures of success that show the impact we will make, ensuring we can track progress and success.

## THRIVE: Delivery Model



## 4.1 Better Care Everyday

Our priorities are framed around the three dimensions of quality: care is safe, effective, and that people have as positive an experience as possible.

## What we want to achieve

We will ensure exemplary quality of care in everything we do by focusing on 'Being Better Everyday'. Our priorities are framed around the three dimensions of quality, i.e. that care is safe, effective, and that people have as positive an experience as possible.

We will have a **safety through learning** culture. Through compassionate and inclusive leadership, we aim to ensure all colleagues feel psychologically safe to speak up and learn from when things go wrong, as well as when things go well. When coupled with listening and learning from the feedback of people and communities, this means we will grow a culture focused on ensuring safety through learning in everything we do. We will be a **trauma informed organisation**, recognising how trauma in people's lives can impact hugely on their health and wellbeing and we will do this through ensuring our colleagues all have the skills and understanding to work in this way.

We will work with people, communities and stakeholders to develop and deliver accessible, inclusive and responsive services, through a trauma informed approach. We believe in **supporting people to receive care where they live, in a way that eliminates inequalities and promotes equity of outcomes and experiences**. We are ambitious to make sure people start life well, live well, age well and die well. We will work with all our partners to optimise care delivery opportunities towards outcomes and experiences where people feel truly at the centre of their own individualised care journey.

We will **embed innovation to the core of how we design, develop and deliver our services**. People and communities rightly expect to be at the centre of high-quality care that is seamless, effective and digitally enabled. We commit to exploring different approaches and to doing things differently so that we deliver and exceed the ambitious standards we set ourselves and all our partners expect.



## What we will do to get there

### 1. Grow our safety through learning culture by:

- Implementing systems around Datix to ensure safety incidents are reported in a positive way and fully integrated into learning
- Developing a ‘safety through learning’ brand, incorporated into every team meeting, which supports all colleagues to raise learning opportunities, based on psychological safety and a shared drive for being better every day.
- Being a trauma informed organisation

### 2. Develop and deliver accessible, inclusive and responsive services by:

- Expanding the self-care team, working with people, communities and stakeholders to shift the balance from reactive care to proactive care
- Improving use of data so the end-to-end experience is seamless and visible to all, and checkpoints are hardwired into the patient journey to aid personalisation

### 3. Embed innovation to the core of how we design, develop and deliver our services by:

- Expanding our research capacity and capabilities in areas that have a direct impact on the quality of outcomes and experience for people, colleagues or communities.
- Enhancing the everyday culture and capability focused on quality improvement, through daily practices
- Empowering and encouraging colleagues to change processes and ways of working within their services



## How we will measure success

- Significantly more colleagues say:
  - “I feel safe to raise concerns”
  - “Locala is a learning organisation, and we have the systems and processes to enable this”
  - “Locala is optimising the experiences of people and communities to be independent and involved in their care”
- Excellent patient and colleague feedback on the quality of our services
- Active in research tests/trials (at least one per quarter) to build our credibility



## 2.1 Empower Our Colleagues

Locala will be known for our agile and dynamic culture, making full use of our social enterprise status.

## What we want to achieve

Through our Caring for Colleagues programme, we will ensure our **diverse workforce is the most inclusive and engaged community health and care provider within any location we serve**. Locala will be known for our agile and dynamic culture, making full use of our social enterprise status. We will significantly improve our productivity, supporting many more people where they live, more efficiently and effectively: innovative use of digital technology will be a crucial tool to enable this.

Given the changing external context, fundamental change in culture is needed to ensure Locala can deliver this strategy. This requires a more forward-looking mindset amongst senior managers, spending much more time focussing on the future and empowering colleagues to deliver current plans - and much less time 'fighting on the here and now'. This will involve linking change to Locala's values and senior leaders role modelling agile and dynamic decision making.

Effectively empowering colleagues will also need the right people in the right roles, with much greater clarity around expectations of their responsibility, authority and where to access support and guidance and support.

This will ensure we make better decisions, reach out to all patient communities and ensure we have a workforce who feel valued and excited to work for Locala, progressing ideas to drive the business forward.

Our greater focus on inclusion will cultivate a culture of belonging that values diverse experiences, ideas, and perspectives, prioritises equal opportunities, celebrates diversity and uniqueness, and fosters an environment where individuals can bring their true selves to work. We will be an anti-discrimination organisation, ensuring all colleagues feel valued, supported, and able to bring their 'whole self' to work. Our three-year EDI action plan will be the key to achieving these ambitions, setting a clear way forward to be the Locala we want to be and aligning with West Yorkshire EDI plans.



## What we will do to get there

1. Through Caring for Colleagues, continue to develop Locala’s employer offer to support colleague engagement that will drive retention and attraction and continue to invest in developing our workforce pipeline
2. Equip all managers to live up to our expectations of a ‘Locala Leader’
3. Build on our Silver status Investors in People Accreditation to achieve Investors in People Gold and ‘make work better’
4. Continue to embrace the benefits of diversity of our workforce and ensure an inclusive culture so all colleagues feel they belong and can bring their true self to work and fully contribute to delivering inclusive services
5. In doing so, be an anti-discriminatory organisation opposed to, and will prevent discrimination of any form
6. Develop our business intelligence capabilities to ensure the business can monitor performance and decisions are informed, particularly assurance to the Board on key strategic issues
7. Implement our Governance Framework that will ensure those decisions are made at the appropriate and assurance is similarly received at the appropriate level
8. Significantly improve the productivity of our clinical and support services including implementation of digital interventions that support patient delivery



## How we will measure success

- Achieve 'Investors in People' Gold award in 2025
- Our cultural success is associated with market leading retention rates.
- Locala looks and feels very different in terms of leadership diversity
- Higher employee advocacy rates
- Stonewall benchmarking on diversity
- High engagement with our leadership programme across all levels of leadership which results in positive colleague feedback, both attendees and colleagues of those leaders attending.
- Changes to systems and processes demonstrate increased productivity alongside higher patient satisfaction rates and lower wait times



## 2.1 Serve More Communities

We will be a strategic partner in tackling the root causes of health inequalities in the communities we serve. We will also offer self-funded health and care services to meet community needs, improve our financial sustainability and create growth opportunities.

## What we want to achieve

We will provide self-funded health and care services to meet community needs, improve our financial sustainability and create growth opportunities. We will be a leading provider of publicly funded health and care services in communities across West Yorkshire and Greater Manchester. This includes developing our delivery of, and partnerships with, both primary and social care services.

We are proud to be part of primary care networks in the Places we work in but we know there is so much more we can do. Building on successful partnership work with GPs and other key partners including community pharmacies, social prescribers, patient groups, VCSE organisations and others, we know that this is a key driver to ensure people can THRIVE in their communities. We will explore different ways we can work with and support primary care, from partnership working to offering back office support to running more GP practices.

We also want to see how we can align more closely with social care services, as our work in community health so often is connected to people's social care needs at home. We will explore how we can best do this in partnership, building on our strong relationships with social care teams, the care home sector and housing providers to develop creative solutions to allow people to be supported at home wherever possible.

We will be a strategic partner in tackling the root causes of health inequalities in the communities we serve. We recognise that everything we do already contributes to health inequalities, this ambition is about going above and beyond to make a greater difference to those who need it most. We will focus our social value impact to make the biggest difference to those who really need it, using our social value framework to drive this key area of work forward in a targeted way.

There is an opportunity to use funds and experience secured from delivering self-funded contracts to improve our publicly funded services. We will look for opportunities to offer paid for services to those who can afford it in areas that complement our contracted work e.g. pain management, dental. We will not offer 'tiered' services where fee paying patients are able to receive faster treatment for community services which Locala is contracted to deliver by the public sector.

Longer term sustainability is key to our strategic ambitions, and we will explore working more closely with partners through a range of different activities including joint ventures, shared efficiencies and potential merger opportunities.

## What we will do to get there

### **1. Develop and build self-funded services within our region, complementing our existing services. Our focus is on the following services:**

- Locala Wellbeing: a combined package of services that could be sold as a 'wellbeing' offer to a wide range of employers as a benefit for their staff. It could also be marketed to individuals able to pay and unwilling to wait for publicly provided services.
- Locala Plus/Living: Develop complementary commercial partnerships with providers of supported and social housing, residential and domiciliary care to help fulfil their unmet needs.
- Social Care: Explore opportunities in the social care space including domiciliary care and reablement support services.
- Dentistry: Explore a range of dentistry options.

### **2. Become a stronger alliance partner within West Yorkshire, delivering existing contracts and proactively seeking opportunities for greater integration through retention of key service contracts, securing new ones and offering proactive proposals back to the system.**

### **3. Significantly scale our publicly funded services in Greater Manchester, winning contracts to deliver services in areas of existing good practice, through tenders and partnerships. We will invest in a dedicated Greater Manchester 'in person' engagement team, to build local knowledge and partnerships, building on our sexual contracts.**

### **4. Scope up a clear programme of primary care developments including partnership work, PCN level projects, creations of health hubs, back office package of support and taking on further GP practices.**

### **5. Bring together different data (Public Health, PCN datasets, etc), triangulate it with our own intelligence to inform coordinated and targeted action for the priority individuals and population groups through creation of a dedicated Health Inequalities Multi-Disciplinary matrix team to tie together activity in existing Locala services (e.g. Whitehouse, clinical van) that address health inequalities.**

### **6. Explore and agree our approach to partnerships, alliances, acquisition and merger opportunities which bring cohesion and sustainability across the sector.**

## How we will measure success

- Increased year on year profitability
- Self-funded opportunities launched
- Existing contracts retained
- Customer feedback: will be highly positive and in line with feedback for Locala's other services.
- Significant social impact for the people and communities we serve
- Positive colleague feedback about the impact of new ventures on the overall quality of Locala services and on creating new professional development opportunities
- Reducing health inequalities across the Places we work



# THRIVE

Serving Our Communities

Locala  
Health & Wellbeing

Locala Community Partnerships CiC

Registered in England and Wales. Company no. 07584906.

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