

## **PLUNKETT FOUNDATION STRATEGY: 2018 – 2022**

### **Introduction**

The Plunkett Foundation helps rural communities UK-wide to tackle the issues they face, through promoting and supporting community business. Community businesses are enterprises that are owned and run democratically by members of the community and others, on behalf of the community. They come in many forms, including shops, pubs, woodlands and anything which lends itself to community ownership. In addition to developing and safeguarding valuable assets and services, community businesses address a range of issues including isolation, loneliness, wellbeing, work and training.

Plunkett's role is to advocate and champion the concept of community business to ensure communities throughout the UK are aware of the model and its potential; feel empowered to take action themselves; and operate in a supportive environment. Plunkett provides practical advice, support and training to help communities establish and run successful community businesses with long term survival rates.

Plunkett is proud of its roots; it was founded by the great Irish co-operative pioneer, Sir Horace Plunkett, in 1919. For almost 100 years, it has supported rural communities to thrive through community business and to improve the quality of life for all. Today, it represents the interests of over 500 rural community businesses that it has helped to establish and a further 400 in the process of setting up, as well as those who are just starting on the path.

### **Our 2015-17 strategy**

For the last few years, we have focused on growing the rural community business sector, specifically through piloting new community business models and targeting those areas, both geographic and sectoral, where the model was less developed. We have launched successfully a number of new programmes aimed at raising awareness and pioneered community ownership among a wider range of sectors, including pubs, woodlands and health care. In particular, we have sought to reach areas where Plunkett was less known, including the Devolved Nations, the North of England and specific English counties, such as Lincolnshire.

### **Our 2018-2022 strategy**

Our forward strategy covers a five-year period and seeks to build on and extend the previous work. We are not proposing a major shift in whom we seek to help or what we do, but we aim to be more focussed and to target our resources and efforts more clearly and effectively. We shall continue to focus on growing the rural community business sector; to encourage its development more widely; and to spread understanding and awareness, nationally and locally, of the important role it plays in supporting the well-being of rural communities and the potential it has to deliver benefits more widely.

Over the next five years we aim to:

- help more communities to develop and open new community businesses and to ensure those already trading have the support they need to thrive
- increase awareness of the relevance of the community business model and extend its accessibility and associated support in all rural parts of the UK
- extend the social impact community businesses have to all those living in the rural communities we support, especially to those vulnerable to poverty, health issues, isolation and loneliness
- create an enabling environment for community businesses in terms of the policy, funding and advisory landscape they work within
- improve Plunkett's own sustainability to ensure it continues to address the needs identified

To achieve this, we will:

- Review our frontline service to ensure it, and our intermediaries, are providing the right level of support at all stages of setting up and running a community business, and specifically, helping communities to progress through those stages
- Develop good working relationships and partnerships with local and regional infrastructure throughout the UK, to enable us to understand better the issues affecting rural communities and to increase the visibility and accessibility of our support
- Ensure our communications and marketing focus on the impact of community business rather than specific business models
- Work collaboratively and strategically at a national level to raise the profile of rural community business and to champion their needs
- Gather and publish information and data on needs and the role of community businesses in meeting them
- Refresh our business model and longer term financial planning, in order to develop alternative income streams and to reduce our dependency on project funding.

Plunkett is a small organisation with large ambitions. Our forward strategy recognises that we cannot achieve these alone.

Underpinning the strategy, therefore, is a commitment to work with others, co-operatively and in partnership, and to encourage greater sharing of knowledge and expertise. We are realistic in that we cannot achieve all our ambitions immediately and will need to balance our activities with the resources available. We will work to grow our resource base over the period of the strategy.

## **Our operating environment**

Plunkett does not operate in a vacuum. In drawing up our strategy, therefore, we have had regard to external factors which will impact on rural communities and on our work, both now and in the future. Whilst we cannot predict the future, there are a number of issues current or emerging which present both challenges and opportunities. A brief note of the key points, as we see them, is set out below.

### ***a. Social and economic change***

- Access to essential services and facilities – the decline in local facilities, such as grocery shops, banks, post offices, and pubs, is likely to continue, for succession or commercial reasons. Fewer than 50% of village shops are now in existence compared to a decade ago, and rural pubs are closing at a rate of 29 a week. Bus services have reduced, making access to services in the nearby towns, for those without a car or unable to drive, more difficult. At the same time, more communities are looking to play an active role in safeguarding or retaining key services locally.
- Health and wellbeing – whilst health and morbidity in general are better in rural areas, there has been a continuing centralisation of health services and a withdrawal of public health services from rural areas and small towns, including GPs, hospitals, dentists and social care. A Rural England CIC report in January 2018 highlighted particular issues facing providers of social care at home to older residents and the additional costs involved. The rural population is older and ageing faster. By 2029, it is estimated that there will be around 930,000 people with social care needs living in rural areas.
- Connectivity – good mobile and fast broadband connectivity continues to be a problem for many rural areas, particularly in remoter parts of the UK. This hampers new forms of service and ways of working and reduces access to markets. Community-owned equivalents are being explored, but are expensive to implement in comparison to urban counterparts.
- Housing – affordability is a key issue for many rural areas, with average house prices now over eight times the average salary in 90% of rural local authorities in England. Despite greater recognition of the need for more housing, particularly affordable housing, and a commitment to an increased building programme, it is unlikely that the situation will improve markedly in the near future. The major impact is on younger people and those on lower incomes, who are increasingly priced out of rural areas.

This, in turn, has an impact on the viability of local services, such as schools, shops and post offices. Many communities are turning to Community Land Trusts and forms of co-operative housing as a way of meeting local housing needs.

- Employment/Economy – whilst employment in some traditional industries continues to decline, there is a growth in home-working and self-employment. Rural areas are heavily dependent on small and micro businesses. There remain, however, problems relating to lack of opportunities, poor skills levels, access to training, low pay, lack of premises, poor connectivity (transport and digital) and poor business support infrastructure. The opportunities for co-operative enterprises are largely untapped.
- Poverty – Limited social mobility is a striking issue in rural areas, as illustrated in recent research conducted by the [Social Mobility Commission](#). Nearly 1.5 million (16%) people in rural England are in absolute income poverty. This includes nearly 1 million working-age people, together with a total of 0.5 million children and pensioners. 18% of households are below the official poverty line, due to fuel poverty, compared with 16% in urban areas. A quarter of all children in rural districts live in low-income households. This compares with a third of those in urban districts. Fuel poverty is a particular issue in rural areas, with lack of access to mains gas etc. In some rural areas almost 40% of village households live in fuel poverty. The opportunity for community energy suppliers is increasingly seen as a way of overcoming some of the problems caused.
- Volunteering – Traditionally, there is a higher rate of volunteering in rural areas; 29% of people living in the most rural districts in England have given unpaid voluntary help at least monthly over the last year, compared with 21% of people living in the most urban authorities. This presents an opportunity for community ownership to be a realistic solution to many challenges. At the same time, however, it may result in an over reliance on volunteers, and particularly of the older demographic, but also the nature of volunteering is changing with many people, particularly women, working longer and taking on caring responsibilities and less able to volunteer.

#### ***b. The political environment***

- Brexit - Although Brexit is currently causing some turbulence and uncertainty for rural communities, as elsewhere, this should be resolved over the period of the strategy. Rural communities within the UK will face a number of challenges – loss of EU funding, changes to agricultural support, impacts of reduced immigration in certain key industries, such as agriculture, horticulture and tourism. But, at the same time, this will also create new opportunities and solutions.
- Devolution - As devolution continues throughout the UK, not only between the different nations, but also within English regions, there will be challenges for Plunkett and communities to be connected to the various administrations and public bodies.

More localised solutions and delivery will bring benefits, but it will make it harder to replicate solutions more widely. It will be important for Plunkett to strengthen its local base and networks.

### ***c. The funding environment***

- The squeeze on public funding is likely to continue and, in some areas, increase. Medium and long term public funding for rural and community infrastructure has mostly disappeared and is unlikely to re-emerge in any degree. This has led to an overdependence by infrastructure bodies, such as Plunkett, which provide advice and support, rather than direct service to customers, on relatively short-term project funding. The need is to develop relationships which can build profile and reputation, rather than direct income streams, but also to look for other ways of supporting core costs.
- In Plunkett's case, we are already well known and well supported by the majority of national grant making organisations. The challenge and opportunity is to maintain this level of support. The emphasis by some funders on supporting 'new' organisations or 'innovation' can result in reduced funding for existing activities, even where they are still needed and wanted. In addition, the shift towards place-based investment and impact and evidence-based funding decisions, with the emphasis on urban measures of deprivation, such as the Index of Multiple Deprivation, which don't capture the true picture of rural disadvantage, mean that rural communities and rural support organisations are underfunded or overlooked.
- The anticipated close-down of Power to Change within the strategy period – a dedicated funder of community business activity – presents a particular risk for rural community business support and for Plunkett. The opportunity exists, however, to work with them in their final closing years to ensure that an effective infrastructure is put in place and that rural communities get their fair share of any investment now and in the future.
- Many independent foundations and trusts, such as the Esmée Fairburn Foundation, have become increasingly important players in providing support for community businesses. However, there is no funder currently resourcing a large-scale or dedicated rural programme addressing the unique needs of rural communities. The challenge for Plunkett over the period of this strategy is to raise awareness of the needs of rural communities and the opportunities presented by community business solutions.

## **Our Vision, Mission and Values**

We have reviewed and re-articulated our vision, mission and values to ensure they remain relevant.

## **Vision**

Plunkett's clear vision is for:

***Resilient, thriving and inclusive rural communities.***

In our experience, rural communities have demonstrated resilience most when they work together to take control of the assets and services they value and need. We have seen first-hand how such action leads to inclusive and participatory businesses which stimulate social and economic activity for the long-term. These businesses are also proven to create opportunities for all and to improve people's quality of life, especially those most vulnerable and in need of support.

## **Mission**

Our mission is to:

***Inspire and empower rural communities to work together to find solutions to their needs through sustainable community enterprise.***

We will inspire rural communities throughout the UK to consider setting up and running a range of community businesses, by providing information, advice, case studies and resources; by delivering marketing and communications activity; and by developing effective partnerships with national, regional and local stakeholders.

We will empower rural communities to create and run community businesses by providing practical support, training and networking; and by championing and giving voice to those already doing so.

## **Values**

To help us deliver our vision and mission, we have a clear set of values that reflect the activities of our organisation and the culture of our people. These values apply to our board, our staff and our members.

***We are Inclusive, collaborative, innovative and accountable.***

In practice, this means we seek to be:

- **Inclusive:** we aim to be truly national in our approach to inspiring and enabling community business to grow throughout the UK. We take time to understand the different challenges facing each nation and make efforts to ensure our services are accessible and reflect the needs of those nations and the people within them. We also recognise that community businesses include a broad range of enterprise models and ownership structures and that there is no 'one size fits all'.

- **Collaborative:** We cannot achieve our mission alone and seek to maximise the benefits of collaborating with national, regional and local stakeholders and partners to enable us to reach more communities and make the best use of shared skills and resources.
- **Innovative:** We want to ensure our support remains relevant and meets the future needs of rural communities. This means we evaluate and evolve our services continuously, often delivering ground-breaking activities which create sustainable businesses with longevity.
- **Accountable:** Across all of our activities, we are accountable to our members, partners, our funders and the wider community. We deliver all our work with honesty and transparency and to the best of our ability. We invest in our people and trust them to act in the best interests of achieving our vision and mission. We abide by the main principles of the Charity Commission Code of Conduct.

Above all, the Plunkett Foundation believes in equal opportunities in all we do, as an employer and as partners. We care about people and communities and treat all those with whom we come into contact with respect, honesty and integrity and we value diversity and equality.

## Our Strategic Objectives

Five strategic objectives will govern our work to enable us to achieve our mission over the five-year strategy period.

### **1. Growing the sector: *Helping more rural communities to succeed in opening community businesses and ensuring those already trading have the support they need to thrive***

We are already supporting over 400 communities in our pipeline; we continue to inspire 300-500 new enquiries every year; and we typically see 15 or so succeed in opening each year. We want even more communities to succeed in setting up new community businesses. This doesn't necessarily mean generating more enquiries, or growing our pipeline, but ensuring those we do help have an even stronger chance of reaching trading stage. It also means a stronger and more resilient sector with existing community businesses thriving and achieving long term survival rates.

#### How will we do this

Critical to achieving this is a frontline service to support rural communities throughout the UK at all stages of setting up and running community businesses. We will review and refresh regularly our services to ensure their relevance, quality and ability to achieve greater conversion of those entering our pipeline to reach trading stage. We aim to be the first-stop place for rural communities to come to for information, advice and support.

We will then use our unique position to convene, co-ordinate and, where necessary, signpost to other forms of support provided by other organisations and intermediaries.

## **2. Extending our relevance and reach: *Ensuring the community business model and the support available is relevant and accessible to communities in all parts of the UK***

Plunkett has a UK-wide remit and a responsibility to ensure our advice and support are accessible to communities from all rural parts of the UK. However, given our resources and location, we are inevitably better known and more active in some areas. Our recent attempts to target geographic areas on rotation, with marketing, events, partnership building and support, has shown that this does not create a lasting legacy in those areas. Equally, it is not sustainable to maintain an intense 'on the ground' presence and profile in all parts of the UK at all times. We will, therefore, focus on building national awareness of the community business model; ensuring that Plunkett has credibility as a UK organisation; and removing barriers to communities accessing our support.

### How we will do this

We will develop our knowledge base of the varying challenges facing communities in different parts of the UK and adapt our communications, marketing and stakeholder plans in each of the four nations and regions in England. To ensure relevance of the community business model to communities throughout the UK and those experiencing a wide range of challenges, we will support a broader range of community ownership models and solutions. Over the period of the strategy we will work with others to extend our reach and our services, either directly or through others, across the regions and the UK.

## **3. Increasing social impact: *helping prospective and existing community businesses to focus on the social impact they will have on all those living in their communities***

We attach great importance to ensuring that the community businesses we help go on to tackle the acute problems and challenges facing the people living and working in those communities and, specifically, those most likely to be disadvantaged through health, mobility, poverty, or social and digital exclusion. Disadvantage exists in most rural communities and is often hidden. So, we need to demonstrate more strongly the case for how community businesses already tackle such issues and provide the tools and resources to help others replicate this impact.

### How we will do this

We will increase our ability and capacity to monitor the impact rural community businesses have and to reflect these findings in our communications and marketing narrative.

We will share these with others to influence their activities and also have a very clear narrative about what the Plunkett Foundation is, who we help and how, and to apply greater prioritisation in our support allocations to those who can demonstrate impact.

**4. Creating an enabling environment: *Advocating rural community business throughout the UK and championing their cause to create a supportive policy, funding, and advisory landscape for them to operate within***

Plunkett has a well-earned reputation nationally and locally. We will maintain and, where possible, enhance our profile as the national body for rural community businesses, with the knowledge, output and relationships to match. This will mean demonstrating that we understand the varying issues affecting rural communities throughout the UK; have good relationships with a variety of models of community business; and represent and champion their interests. Above all, we want to create a smoother journey for communities to set up community businesses and make it easier for those already running them.

How we will do this

We will work collaboratively and strategically at a national level with a range of stakeholders, including government and public bodies, corporates, funding institutions and other third sector organisations. We will seek to grow our own profile as a means to enhance the understanding of rural community business; we will maintain a proactive and positive communications and policy output, demonstrating the positive contribution of rural community business; and will make use of our ability to participate in and convene national partnerships, alliances and campaigns.

**5. Improving Plunkett sustainability: *Ensuring the long-term survival of our service and that of the wider rural community business movement***

To achieve our ambitions for rural communities, we need to offer a consistent and reliable service to rural community businesses and to the partners and stakeholders with whom we work. We, therefore, need to improve our longer term financial stability, in order to be able to plan ahead with some confidence.

How we will do this

We will review our business model and financial planning and implement longer term budget cycles. We will seek to develop alternative income streams and reduce our dependency on project income. We will identify clearly our core activities and functions, which will remain the heart of the organisation, and seek to be more flexible in how we approach and use project funding to enhance these core activities.

## **Actions**

Four areas of work are essential to achieving our strategic objectives.

1. A **Frontline** support service assisting rural communities to set up and run community businesses
2. **Engagement** activities which raise the profile and champion the issues of community business
3. An **Information and Innovation Hub** to develop intelligence of the rural community business sector and underpin our activities
4. **Resourcing our work** through high quality people, governance, operations and financial management.

## **1. Frontline Support Service**

### ***Ambitions***

To achieve our strategy and deliver practical support to rural communities, we want to:

- be the first place communities come to when seeking support for setting up or running a rural community business
- respond and support communities from throughout the UK that align with our agreed criteria and for our support to be relevant and accessible regardless of geography
- support communities through the entire lifecycle of setting up and running a community business
- ensure our own support is of the highest quality and to make a significant difference in helping communities progress through the various stages of setting up a community business
- work with other providers of support, both local and national, who can complement and enhance our services
- extend our support to a broader range of community businesses that benefit rural communities
- grow the impact of rural community businesses in responding to local issues and improving quality of life
- ensure we identify and support groups who have the greatest need and where the groups themselves are proactively seeking to support those most vulnerable and in need.

### ***Proposed Activities***

Achieving these ambitions will mean a shift and refocussing of some of our activities and support.

In future, we will:

- maintain a staffed advice line for rural communities to contact at any stage of setting up and running a community business.
- refresh and broaden our agreed criteria for what a rural community business is and whom we can help. This will define our geographical focus as solely UK, allow communities to self-define their 'rurality', and be more open and supportive of a wider range of community ownership solutions that work for rural communities.
- review and update our support offer to community businesses with a focus on helping communities progress through the stages of setting up. Support will be maintained at all stages of the lifecycle - Inspire, Explore, Create and Thrive – but we will review the extent and type of support we provide at each stage annually.
- work more closely with other providers of support and develop relationships with organisations that can provide services to community businesses. This is to ensure we are not replicating what already exists and enables us to focus on the gaps. It also ensures community businesses benefit from the very best of support. As we build up this network of complementary support providers, we will aim to position Plunkett as facilitators of rural community business support throughout their lifecycle.
- recognise our support offer will need to differ in different parts of the UK. We will present a clear offer to rural communities in each nation and regions of England.
- develop support programmes where communities can access finance in the form of grants and loans in collaboration with partners, as this is a known gap in the market place and an obvious barrier preventing communities from reaching trading stage.
- aim to be more entrepreneurial in our approach to delivering support, for example, by using technology, such as webinars, to deliver advice to multiple beneficiaries, and charging for elements of service.
- review the level and nature of support Plunkett staff deliver to communities and how this can be complemented by our adviser network to ensure we deliver only where we are confident in doing so. We will also review the current adviser network with a view to contract those most engaged with our work and better able to represent Plunkett.

## **2. Engagement Activities**

### ***Ambitions***

To achieve our objectives to raise the profile of and champion rural community businesses, we want to:

- raise national awareness of the community business model and of the support Plunkett has to offer

- strengthen the case for how community businesses tackle rural problems
- form strong and mutually beneficial relationships with rural community businesses
- represent and champion the issues community businesses are facing
- develop better knowledge of the diversity of issues facing rural communities and of the existing support infrastructure
- develop stronger relationships with local, regional and national support bodies
- increase our profile as a national body tackling rural challenges and play a more strategic role in working with other national bodies and networks
- become better known for collaborating with other organisations and for creating innovative networks of people and organisations tackling rural problems

### ***Proposed activities***

We will focus on three main activities for achieving these ambitions over the lifetime of the strategy – *advocacy, communications, and membership.*

- **Advocacy**

- i. *Campaigns, policy, member consultation and representation in the rural sector*

We will continue to develop a strong and active voice representing rural communities and the issues they face and champion the potential for community ownership, as well as those already running community businesses. We will achieve this through:

- Increased consultation with community businesses on the key issues affecting them and promoting our findings through press releases, social media, newsletters and blogs.
- Influencing policy via membership of various partnerships and alliances such as the Rural Coalition and Communities Partnership Board.
- Nurturing relationships with key government departments and seeking their endorsement on our activities.
- Thematic media campaigns, such as rural loneliness, which will form a core part of our communications work to raise our profile and represent the issues we are addressing.
- Attendance and representation at key sector events as a speaker, exhibitor or delegate
- Hosting our own influencing events with key stakeholders such as report or project launches.

- ii. *Collaboration*

We will:

- work in closer collaboration with national, regional and local bodies who share our values and with whom we can achieve greater impact.

This will involve a proactive approach to establish new partnerships and alliances, as well as maintaining existing relationships with partners.

- explore the feasibility for convening national stakeholder meetings concerned with rural community businesses. These might follow a similar format to the recent *Dumfries House Event*, which brought together community businesses, support organisations and funders in Scotland to discuss nation specific challenges and the role community business can play, and opportunities for collaboration. These would be phased over the period of the strategy as resources and capacity allow.
- At a regional and local level, seek to work with organisations and individuals who are supporting rural communities and those specifically supporting rural community business. Examples might include members of NALC and ACRE (and their members) with whom we can work together to raise the awareness of community business, through to independent business advisers who might support gaps in our own advisory service.

- **Communications**

- i. Marketing*

We will:

- maintain our high level and high-quality communications output with an aim of reaching both new and existing stakeholders. We will build on our good communications record with our existing members and stakeholders, which is effective at building a movement and will enable us to be well positioned to react to national PR opportunities when they arise.
- improve our ability to communicate proactively to new audiences, by:
  - developing and nurturing new relationships with journalists from the wider sector
  - producing more press releases celebrating all aspects of our work
  - commissioning national and regional press agencies, where we have fewer contacts or where specific expertise is required
  - exploring paid-for marketing opportunities or sponsorship of profile raising events
  - collaborating with other organisations on press activity, where there are shared audiences and objectives
  - working more closely with community businesses to share their individual stories
  - continuing to resource and develop our social media profile
  - delivering events that act to inspire and bring together those individuals and organisations that are looking to explore rural community business.

- ii. Branding*

We have reviewed our existing 'Plunkett Foundation' branding and consider it is well known and continues to be fit for purpose. However, whilst we propose to make no changes to branding, we are updating our language and will in future refer to 'community business' rather than the umbrella term 'community co-operative', to avoid confusion regarding legal structures and our criteria for support. 'Business' is more easily understood and inclusive of a wider range of legal structures. We remain proud of our heritage, however, and will maintain our relationships with the co-operative movement and refer, when appropriate, to community businesses as co-operative forms of business.

We have also revised our strapline from ***'Improving rural livelihoods together'*** to ***'Empowering rural enterprise'*** which provides a clearer link to our revised vision and mission.

iii. *Digital Resources*

Over the period of the strategy, as a priority, we will review the current arrangement with the web host and implement a new solution with increased functionality and reduced ongoing maintenance costs. A key outcome will be to own our platform and have control of who we use to manage and update it in future.

In order to reach and inspire new audiences, we will ensure our marketing and information resources are more accessible and easy to share. We will continue to commission a range of professional films and materials to help new networks to understand the community business model, our values and the support we have available. Our digital materials will also give a clearer and stronger voice on why the community business model brings so much value to rural communities across the UK.

• ***Membership***

Membership is the cornerstone of our work and provides a mutually beneficial opportunity to solidify relationships between Plunkett and all those who support our values. This includes our funders, our partners, community businesses, our staff and advisers, through to individual members of the public. In addition to providing a regular income stream, Plunkett benefits from the knowledge and ideas that our members provide and the contacts they introduce. Having a membership base consisting of a body of people and organisations who support our values, also gives Plunkett credibility amongst our funders and sponsors. Likewise, members benefit from a range of support from receiving information, advice, networking and being part of a wider movement.

Plunkett will remain a membership organisation, but it is timely to review, restructure, where needed, and relaunch how membership operates and what it offers. In the longer term, we aim to grow our membership and what it offers, together with associated income. In so doing, we will seek to increase the mutual benefits of membership through enhanced engagement.

As part of this, we will:

- consider the potential to introduce a new low-cost 'friend' category with the aim of increasing significantly the number of individual people who support our work
- review the cost of each membership strand with an aim of increasing membership retention rates
- review the benefits package for members with the purpose of moving away from fixed deals to signposting towards trusted suppliers
- review the frequency and management of membership meetings
- facilitate bespoke training events for our members
- grow the range of membership suppliers and partners who can support a broader range of enterprises beyond shops
- monetise the relationship with membership suppliers through sponsorship
- review the systems used to manage membership to introduce efficiencies and reduce the resource input
- review the role and membership of the PCCN advisory group.

### **3. Information and Innovation Hub**

Our strategy emphasises the desire to strengthen our capacity to gather, collate and make use of information and intelligence on the rural community business sector.

There is currently a limited amount of rural research taking place across the UK and a poor evidence base of the issues facing rural communities, at a sufficiently fine-grained level to enable Plunkett and others to develop services that are needed throughout the UK, as well as to help validate our funding proposals to maintain our support services. At the same time, we have a clear legacy of undertaking research and a more recent tradition of commissioning research and evaluations, such as the annual Better Business Reports, and have a wealth of other internal data which could be gathered together and made more widely available.

#### ***Ambitions***

To achieve our strategic objectives, we want to:

- understand better rural communities and the issues affecting them and be equipped to deal with them better, in particular to support our communications and funding proposals
- understand and map the support infrastructure for rural community businesses
- make use of valuable information and data already held through our CRM and have the potential to make much more use of this underused resource
- collect even better intelligence on the rural community business sector and the issues it is facing

- create an online evidence base to share our own and other organisations information, evidence and research
- maintain and grow the Better Business reports and build on this series with improved information and extending to other business models
- collaborate with other organisations to undertake research, including new partners, such as universities and government departments
- incorporate regenerating the Plunkett library into any such work, to ensure this resource is accessible and the space better utilised
- be able to generate income from this area of work in the longer term, but at least break even in the short term.

### ***Proposed activities***

The establishment of an Information and Innovation Hub is a longer-term initiative for this strategy period and we can only take it forward with dedicated funding. We will explore sources of funding for this work, which we envisage has three clear stages:

*Step 1:* Understand and harness existing Plunkett staff's research capabilities.

- Review our current CRM and its potential to support an Information Unit
- Undertake a skills audit and consultation with staff in relation to research
- Establish a small working group to co-ordinate and take forward any proposed activities
- Create a research area on our website to publish our own and other reports and data on rural issues and rural community business
- Seek development funding to take this concept further.

*Step 2:* Rebuild Plunkett's information capacity

- Define our focus and identify core areas of organisational need and interest
- Develop a proposed research 'team' structure on which to base development aims and funding applications
- Develop and 'publish' an organisational research strategy, emphasising the ways in which research can underpin Plunkett's mission
- Undertake targeted communications focused on 'reminding' stakeholders of Plunkett Foundation's research legacy and highlighting current research related work (e.g. commissioned work; regular advice evaluation; current direct research)
- Conduct a focused stakeholder analysis to examine Plunkett's existing network and identify research active organisations (e.g. commissioning bodies; active researchers; research users)
- Conduct or commission targeted research that improves the organisation's evidence base.

### Step 3: Launch Plunkett as an information and research hub on rural community business

- Partner with other third sector organisations and/or libraries to access information resources
- Market Plunkett in relation to impact, emphasising connectedness to both policy and practice
- Be attentive to project evaluation opportunities
- Proactively build networks with relevant university researchers (those interested in Plunkett's core areas e.g. rural poverty, co-operative approaches, community ownership)

## 4. Resourcing our work

### ***Ambitions***

Achieving our strategic objectives is dependent on having the right people and systems in place to enable us to be an excellent employer and to provide a first-class service.

Our people – staff, Trustees, advisers and volunteers – are critical to our success. We will look at ways to strengthen our human resources and build capacity, through training and ensuring that our systems are up to date, cost effective and efficient, and flexible to meet today's needs. The way we operate is also important and we will also ensure that our governance is of high quality.

Securing sufficient resources over the strategy period and beyond and putting Plunkett on a more stable financial footing is also a high priority.

### ***Proposed activities:***

Over the period of the strategy, we want to:

- Review our 'back office functions' to ensure they meet the needs of the organisation, outsourcing functions where it makes sense and provides a good service
- Look to strengthen the board, including carrying out a skills audit for trustees and seeking new appointments to fill gaps
- Review our governance in relation to the revised Code of Practice
- Be an exemplary employer and enable staff to fulfil their potential through training and support
- Improve our financial sustainability through a range of measures
  - a. Resource our core support service and wider engagement activities
  - b. Achieve at least a break even financial result throughout the strategy period, but seek to secure a surplus on our activities to enable us to undertake necessary development work
  - c. Improve the development and delivery of project activity to ensure full cost recovery

- d. Increase the amount of income we receive for core costs and activity
- e. Grow new types of income sources to reduce our dependency on project income
- f. Explore new forms of earned income that are within our own control
- g. Replenish our reserves and increase our investment income to provide a source of core funding for the organisation