



Strategic Plan Proposal 2025–28

Summary of Key Points:

The **Strategic Plan 2025–28** sets out the key objectives to strengthen **Level Trust’s impact, sustainability, and operational efficiency**. It prioritises:

1. Securing a permanent home for Level Trust

- Fundraising **£1,000,000+** to purchase a dedicated base, ensuring long-term financial stability.
- Reducing rental costs and creating a community hub for families, volunteers, and service delivery.

2. Expanding support for children in need

- Increasing **school shoe distribution to 500 pairs per year** and **laptops to 200 per year** to meet rising demand.
- Launching a **Looked After Children (LAC) Pilot Project** to support educational outcomes for vulnerable children.

3. Strengthening fundraising & financial resilience

- Maintaining **£255,000+ annual funding** from grants and trusts.
- Expanding **corporate and school fundraising**
- Aiming for **35%+ donor retention** for existing donors

4. Growing our volunteer network

- Recruiting and training **15+ regular volunteers** to work at the Uniform Exchange.
- Introducing **corporate volunteer partnerships** and a structured induction program.

5. Driving operational excellence & digital innovation

- Enhancing the **existing website** to simplify donations and increase engagement.
- Reviewing and updating all **policies, governance frameworks, and employee benefits**.

Major Implications:

A. Financial investment & sustainability:

- A significant fundraising effort is required for the new building, but ownership will secure long-term stability and reduce rental costs.

B. Service expansion & demand management:

- Increased distribution of essential items requires additional funding and operational capacity.
- The LAC Pilot Project will require additional partnerships and support from local authorities.

C. Governance & compliance:

- Updated policies and improved tracking will improve efficiency and regulatory compliance.
- Strengthening governance ensures continued effectiveness and accountability.

Recommendation:

Next Steps:

1. Feedback from Trustees and stakeholder consultation.
2. Development of detailed implementation timelines and resourcing plans.
3. Regular progress reviews aligned with governance and performance metrics.
4. Draft Strategic Plan to be approved by Trustees in the summer term following stakeholder consultation. Formal approval in Autumn term 2025.

Level Trust has made a significant impact in helping families overcome the costs of education, ensuring that children in Luton have the opportunity to learn and thrive. However, the challenges of child poverty and educational inequality continue to grow, requiring us to take bold steps to expand our reach, strengthen our financial sustainability, and innovate our services.

The Strategic Plan 2025–28 sets out a vision for growth, resilience, and deeper impact, ensuring that we can continue to remove barriers to education for the children who need us most.

Key strategic priorities



Securing a permanent home for Level Trust

Why this matters:

Owning a property will provide long-term financial stability, reduce overhead costs, and allow us to create a dedicated space for service delivery, fundraising, community engagement and volunteer engagement.

Key Actions:

- Fundraise £1,000,000 for the purchase of a permanent base, ensuring sustainability and security.
- Develop a dedicated fundraising strategy, targeting major donors, grants, and corporate sponsors.
- Explore revenue-generating opportunities, such as renting out space for community events.

Impact:



Greater financial security, reducing reliance on external rental agreements.



A community hub for families, volunteers, and partners to work together.



Hub-style use of new property fits in with Luton 2040 vision and SEN plan for Luton.

Key strategic priorities



Expanding our impact for children in need

Why this matters:

The demand for essential items like school shoes and laptops continues to rise and Looked After Children (LAC) face significant educational disadvantages.

Key Actions:

- Increase distribution of school shoes (500 per year) and laptops (200 per year).
- Launch a LAC Pilot Project, supporting a small group of children in care (approximately 4–6) with targeted educational resources.
- Strengthen partnerships with schools and Children’s Social Care to identify children most in need.

Impact:



More children equipped with essentials for learning and confidence in school.



Better outcomes for vulnerable children, especially those who are looked after.

Key strategic priorities

3 Strengthening fundraising & financial resilience

Why this matters:

Sustainable funding ensures Level Trust can continue delivering its mission, independent of external uncertainties.

Key Actions:

- Maintain £255,000+ annual funding through grants and trusts.
- Expand corporate and school-based fundraising, engaging local businesses and schools in charitable giving.
- Increase donor retention and engagement, aiming for a 35%+ retention rate and higher than average gift sizes.

Impact:



Long-term financial stability and the ability to expand services.



A stronger, more engaged donor base.

Key strategic priorities

Strengthening our volunteer network

Why this matters:

Volunteers are at the heart of Level Trust’s service delivery, and investing in their recruitment, training, and retention will strengthen our capacity.

Key Actions:

- Increase regular volunteers to 15+ at the Uniform Exchange. Ideally 3 per day for 4 hours.
- Introduce a structured induction programme to improve volunteer retention and satisfaction.
- Launch a corporate volunteering scheme, securing commitments from local businesses.

Impact:



A stronger, more reliable workforce to support operations.



Greater engagement from businesses and the community.

Key strategic priorities



Driving operational excellence & digital innovation

Why this matters:

To remain efficient and increase fundraising potential, we must modernise our systems and governance.

Key Actions:

- Enhance the existing website with improved donation functionality to increase regular giving.
- Review and update all policies, governance structures, and employee benefits to ensure best practices.

Impact:



Improved efficiency supporting the organisation to be ready for future growth.



Increased donations through easier online giving.

Measuring Success Key Performance Indicators (KPIs).

- Financial Growth: Secure £1,000,000+ for property purchase and maintain an annual income of £255,000+ through fundraising.
- Child Impact: Increase school shoe distribution (500/year) and laptop provision (200/year).
- Volunteer Engagement: Grow regular volunteer numbers to 15+ regular volunteers and corporate volunteers to 2 per week.
- Donor Engagement: Achieve 35%+ donor retention and to increase donor retention rate to 75%+
- Operational Efficiency: Ensure all policies and governance frameworks are up to date and effective.

Conclusion

This Strategic Plan is an ambitious, yet necessary, step forward for Level Trust’s future success. It ensures that we secure long-term stability, expand our support for vulnerable children, and strengthen our operations to serve the community for years to come.

We welcome feedback from stakeholders to support us to refine this plan. With collective effort and commitment, we can continue to work towards breaking down the financial barriers to education and create a brighter future for children in Luton.

Next Steps



Stakeholder Consultation

May – June 2025.



Fundraising Strategy Development

Define approaches for securing the new building. June 2025 Board Meeting.



Implementation Roadmap

Assign responsibilities and timelines for key actions. June 2025 Board Meeting.



Formal approval by Trustees

September 2025.



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