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Reaching out

Golden Key Local Evaluation Phase 1 Full Report

Bristol Leadership Centre
Bristol Business School

April 2016

GOLDEN KEY

BIG LOTTERY FUND
LOTTERY FUNDED

Foreword

Golden Key is a Bristol based, Big Lottery funded, eight year initiative which focuses on people who are farthest away from services. Our target clients experience a challenging mix of homelessness, long term mental health problems, dependency on drugs and/or alcohol and offending behaviour. Our aim is to find new ways to break this cycle of deprivation and dependency and create new, positive, futures for those with the most complex needs.

Golden Key is a partnership made up of service commissioners, service providers and people with lived experience. We are not a new organisation but an initiative designed to find better ways of providing services. Our business plan therefore sets out how we will pilot new ways of working and act as an agent for sustainable system change. We are well into the second year of our complex work. If we are to succeed in achieving our aim, we must put a high premium on learning from our experience. We have therefore structured reflection and learning in all we do. This first annual evaluation report, from our partner, University of the West of England, is therefore both timely and warmly welcomed.

We are particularly pleased that the evaluators have recognised our success in recruiting and beginning to work with Golden Key clients; that the IF group (which represents people with lived experience) report a positive experience of their engagement with Golden Key; that a good start has been made by the service co-ordinator team and that the Golden Key Board represents a place for powerful leadership. The report is also challenging, not least in its formulation of key learning points and questions for discussion. Whilst Golden Key is deemed to have succeeded in bringing partners together and promoting an aspiration for collaboration to improve services, findings such as *"a notion of collective achievement is not yet at the forefront of partner thinking"* suggests there is much to be done to embed the Golden Key approach across Bristol services.

This report will assist us in moving forward to the next phase of our work. This will involve the full implementation of our innovation pilots and the identification of and work on system change priorities. This report clearly sets out the issues we need to consider if the next phase is to be a success.

On behalf of the Golden Key Partnership Board I would like to warmly and formally thank the UWE team for their work. We look forward to continuing to work and learn together.

John Simpson

Golden Key Independent Chair
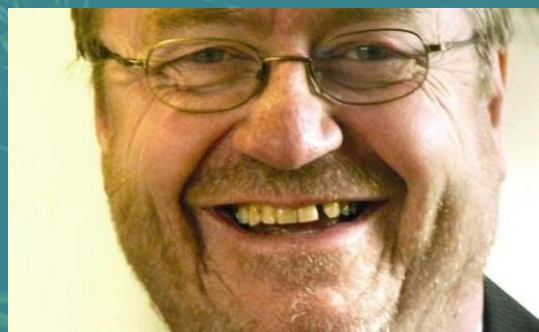
Acknowledgements

This evaluation has been conducted by a multi-disciplinary team, led by Anita Gulati and Richard Bolden at the University of the West of England, with contributions from Roz Gasper, Lizzie Green, Beth Isaac, Richard Kimberlee, Margaret Page, Chris Pawson, Anthony Plumridge, Elliot Stern and Paul Strauss. We would like to thank the Golden Key Programme Team at Second Step – in particular Aileen Edwards, Hannah Mahoney, Jake Sinetos, Joe Fisher and Liv Lehman – as well as the Golden Key Partnership Board, System Change Group, Service Coordinator Team, Independent Futures (IF) Group and everyone else who has contributed towards the evaluation in some way. We are also grateful to the Golden Key Evaluation Advisory Group, chaired by Emma Gibbard, for their support and direction.

A piece of work such as this is inevitably a collective effort accounting for multiple perspectives, we hope that you will find this report a useful summary of learning to date and an opportunity to reflect on your own experience to support the next phase of Golden Key.

The core evaluation team

Anita   Margaret   Anthony   Richard K

Richard B   Chris   Beth   Roz

Abbreviations

Black and minority ethnic	BME
Developing Health and Independence	DHI
Golden Key	GK
Independent Futures Group	IF Group
Making Every Adult Matter	MEAM
Psychologically Informed Environments	PIE
Service Coordinator Team	SCT
Systems Change Group	SCG
Tell Your Story Once (website)	TYSO
University of the West of England	UWE

Contents

1 Overview

- This report presents a preliminary analysis of the evidence collated for Phase 1 of the local evaluation of Bristol Golden Key. Evidence has been collected between November 2014 and March 2016 through a variety of means, including interviews with around 40 key stakeholders, observation at over 25 key meetings and events, and review of documentation.

- Golden Key is a long-term, complex initiative and at this relatively early stage the evaluation is primarily formative in focus – providing observations and reflections on how Golden Key has developed since inception and emerging indicators of how it is perceived and experienced by different stakeholders. The main aim of this report is to 'capture the learning' so far and to raise issues and questions that should inform further development as Golden Key progresses. It does not purport to give an objective assessment of progress against project aims given the paucity of quantitative data to support such an analysis at this stage.

- The report is informed by the evaluation framework developed to support this investigation, which uses a realist approach to identifying how behaviours, processes, outcomes and impacts develop in relation to three main pathways: client engagement; the Golden Key partnership and processes; and citywide engagement and systems change. Chapters are presented for each of these areas, concluding with a set of key learning points and discussion questions.

- In addition to the evidence collected specifically for this evaluation, the report also makes reference to other sources, such as projects, research and/or publications, which may support Golden Key in developing and extending its impact. We see our role as local evaluators as a 'critical friend' to Golden Key – celebrating successes whilst also noting differences of opinion between stakeholders and 'holding up a mirror' about processes and assumptions, in order to facilitate critical reflection amongst Golden Key partners.

- Overall this report reveals a number of significant developments in relation to Golden Key and plenty of evidence demonstrating the commitment and engagement of stakeholders. There is also emerging evidence suggesting the positive impacts this work is having for clients although it is too early to assess the scale and sustainability of such changes at this stage.

- This report marks a continuation, rather than the end, of our consultation and engagement with partners. The points raised are not definitive statements of the current reality of Golden Key but insights into the learning so far and areas for future development. We are now embarking on a process of consultation and dissemination to enable partners to discuss and explore the ideas and questions raised, and will use this to inform the next phase of the evaluation.

- A shorter, summary version of this report is available and will be circulated widely within Golden Key and the wider Fulfilling Lives initiative.

2 Introduction

2.1 About Golden Key

Golden Key (GK) is one of 12 programmes across the UK to have received funding from the Big Lottery Fund *Fulfilling Lives* programme to support the development and provision of services for people with multiple complex needs. GK has a number of ambitious aims, including[1]:

- Unlocking the path to the future for a group of people who currently don't believe they have one.
- Engaging people who are experiencing three or four of the following situations: homelessness, mental health problems, drug and/or alcohol dependency and offending behaviour, who are farthest away from services.
- Unlocking services and enabling agencies to be innovative about introducing new ways to help.
- Embracing new psychological thinking to enable Bristol to be a forward-thinking city with a clear vision for the services required and for change for this client group.
- Putting clients and people with lived experience at the heart of the whole project.
- Learning together to bring about a lasting impact through cultural and system change

2.2 About the evaluation

The Bristol Leadership Centre at the University of the West of England was commissioned in autumn 2014 to act as local evaluation partner for this project. The local evaluation, detailed in this document, complements the overall national evaluation (conducted by CFE Research in partnership with the University of Sheffield) of the BIG Lottery Fund's *'Fulfilling Lives: Supporting people with multiple needs'* initiative. The local evaluation is not intended to duplicate the work of the national evaluators, but seeks to support and catalyse further learning and change in the local area through the collection of detailed evidence from the Bristol area.

This is a long-term evaluation that aims to capture improvements in services and outcomes for the target population, as well as evidence of systemic change in the provision of services and client empowerment, over the 8 years of the GK initiative. The evaluation contributes to GK in a number of ways, including:

- Identifying programme outcomes;
- Exploring mechanisms for change;
- Investigating social value and local economic impact;

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[1] http://www.goldenkeybristol.org.uk/our-story/what-golden-key, accessed 06/02/15

- Exploring the role of psychologically informed working practices;
- Identifying lessons from pilot activity; and
- Eliciting and sharing learning to inform future service design, commissioning and policy-making.

The local evaluation will monitor Golden Key's progress against programme aims and objectives, as well as identifying any unanticipated benefits or impacts over time. The overall purpose of the local evaluation is as follows:

- To understand how GK is articulating, applying and learning from a 'model' intended to improve outcomes for people with severe multiple disadvantage (neither assuming 'success' or 'failure').

Understanding our evaluation approach

There is a large body of research theory and expert practical experience that supports the view that 'realist' and 'formative' approaches are most suitable when evaluating long-term complex interventions such as Golden Key. These approaches can be summarised simply as follows:

- Focusing on understanding how and why something produces a particular outcome in a particular context rather than just measuring predefined outcomes.

- Developing a theory of how activity will generate change, and then testing the theory to see if change happens this way.

- Looking for unanticipated and unintended consequences of particular interventions.

- Capturing multiple perspectives and acknowledging differing experiences.

- Using learning interventions throughout the evaluation to contribute actively and continuously to the development and impact of the intervention.

- To find out more about approaches to evaluation, please visit: http://mcnevaluation.co.uk and http://betterevaluation.org

Evaluation aims and objectives over the period of GK's funding include:

- To describe and analyse the client journey including the responsiveness of services, personal transitions and wellbeing outcomes and evidence of systematic learning from experience.
- To describe and analyse the organisational and institutional development of the GK system in terms of staff capacities; management and leadership, coordination among partners and organisational learning.
- To describe and analyse the contribution that GK is making to citywide change at a community, economic and inter-agency level in the interests of people with multiple needs.

Given the complexity and duration of this initiative we fully expect GK to develop and transform over time and, accordingly anticipate the need to review and revisit the evaluation framework at regular intervals. It is for this reason that we have named this 'Phase 1' as it captures our current understanding and framing of the project following the project start-up phase (18 months).

2.3 About this report

The evaluation has been commissioned to support the learning of GK partners and to help identify and test a 'theory of change' that underpins programme activity. With this in mind, in this first report to partners, we explore the theory of change that is posited in our evaluative framework (see Appendix 1 for further details) in relation to the language, discourse, and actions presented in key documentation, such as the Business Plan and the Systems Change Strategy, which is in progress among other documents and of course through the wider processes, dialogue and actions of the various elements that make up GK in its early evolution. This report incorporates an overview of the journey of GK though its initial phases of inception as well as progress towards delivery, Autumn 2014 to Spring 2016.

This first report is divided into three main sections, akin to the evaluation framework, to support GK in considering three primary levels of analysis as outlined in Figure 1:
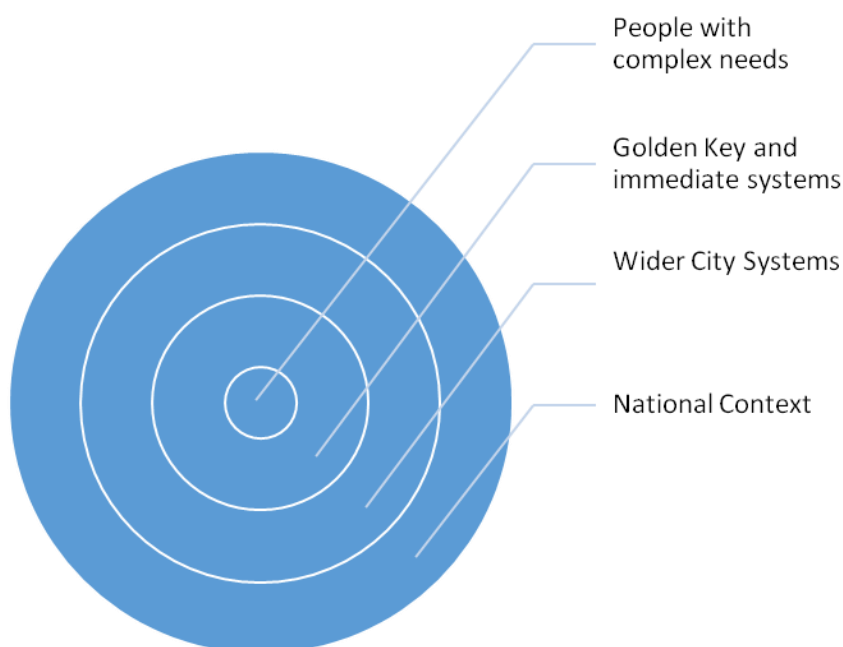
Figure 1 – Golden Key: levels of analysis

In this report we focus, in particular on the three inner circles and their relationship to one another.

This first phase of evaluative activity focuses primarily on the set up and initiation phases of Golden Key and is informed mainly by qualitative data collected through interviews with some 40 key stakeholders, as well as attendance at over 25 key meetings and events. It does not incorporate any of the quantitative data that will inform the subsequent economic and social return on investment analyses as collation of this data is still in the early stages of formation across the Partnership. There are other aspects of GK, such as the innovation pilots and Psychologically Informed Environment (PIE), which do not feature strongly in this report either, as much of this work is still in development.

As such, this report represents a source document, which captures the early emergent learning for Golden Key with particular focus around organisational and institutional developments. The accompanying summary report offers key headlines and questions arising from the initial analysis of the source document. The next phase of the evaluation will focus in greater depth on the client experience through peer research with IF Group members, as well as collation of data for the economic evaluation and on the use of PIE.

3 Client engagement

This chapter presents emerging findings on how GK has engaged with clients in Year 1. It focuses in particular on the establishment of the Service Coordinator Team (SCT), as well as the processes through which clients have been recruited, how client voice has been included through engagement of the Independent Futures (IF) group, the use of Psychologically Informed Environment (PIE), and innovation pilots.

3.1 Service Coordinator Team

We begin with an overview of the Service Coordinator Team (SCT), its formation and relationship with clients.

3.1.1 Recruiting and establishing the Service Coordinator Team

The recruitment of 11 Service Coordinators, a team manager and deputy manager, took place through a phased process that began in November 2014. This recruitment process, led by the Service Coordinator Team manager and Second Step, created new roles for GK Service Coordinators and aimed to select exceptional candidates to fill these. GK set out to second and recruit expert staff with particular specialisms from partner organisations and more widely.

Many Service Coordinators have reported in evaluation interviews that they saw this role as an opportunity to do the job they had always wanted to - supporting clients in a way that is centred on the client's own decisions rather than service requirements, 'walking alongside' the client as a way to identify 'blocks and barriers' and instigate change within the system, and prioritising continued engagement with the client above the usual level. They recognised that this approach, whilst valuable and necessary, is very time consuming and cannot currently be resourced by agencies.

A view shared by SCT members we interviewed is that this work was particularly challenging at first, as several key pillars, such as the digital case management system and GK psychologist, were not in place for many months. In the absence of this infrastructure, Service Coordinators proceeded with the task of engaging and working with clients to the best of their ability but felt that a clearer sense of direction and priorities at the outset would have been helpful. This view was echoed by the GK Programme Team who agreed that 'firmer foundations' could have helped Service Coordinators to do their best work with clients. This is not an unusual scenario for complex projects such as this, though, and stakeholder interviewees praised their flexibility and open minded approach to learning, particularly during the start-up phase as processes evolved and changed. Subsequent developments in relation to the recruitment of a psychologist to provide supervision and reflection have been very well received by the SCT.

The role of Service Coordinators in relation to their seconding organisations was raised in a number of interviews. The degree of their embeddedness in, and ongoing

links to, their original organisation appears to be variable, partly as a result of recruitment process, but also because of differences in the approach of partner organisations themselves. Whilst Service Coordinators may be seen as a conduit between seconding organisations and GK – particularly in terms of client referrals – in several cases there was limited engagement beyond this. As a consequence, several SCT members felt they ended up working quite independently and opportunities for further synergies between partners were potentially missed.

The GK Programme Team have recognised these challenges but largely regard it is a success, particularly the benefits associated with the recruitment of Service Coordinators with special expertise and/or client group focus. Yet throughout the evaluation research, we have also heard a number of concerns from different stakeholders about the extent to which Service Coordinators are encouraged and supported to share their expertise and good practice more widely beyond the SCT (for example through engagement with the System Change Group). Further discussions and reflection involving the Service Coordinators may generate ideas for catalysing further learning within the team and the partnership as a whole.

3.1.2 Service Coordinator relationship with clients

We have heard from Service Coordinators, as well as their managers, that they understand a key aspect of the GK approach to working with clients to be the formation of long-term relationships. The benefits of this have been said to include ensuring 'stability' in their work with clients; stability both of the coordinator-client relationship, as well as stability of access to and relationships with other service providers. A particular factor linked to the need for stability was referred to in terms of the substantial change and flux in several parts of the system - the national reorganisation of the Probation Service being one specific example. It was hoped that through working with clients in this way Service Coordinators will help build trust and increase understanding between clients and service providers, as well as enabling service providers to better understand the work and underlying issues of partner agencies.

A key principle of GK is that Service Coordinators should 'walk alongside' clients, to help bridge the gaps between existing services, rather than providing a 'service' in their own right. This is a fine line to tread, especially given the extensive service delivery experience of most members of the SCT and in many cases long-term experience with and existing relationships to particular communities and service-user groups in Bristol. Through our interviews, meeting attendance, and the documentary analysis, accounts of emerging SCT working processes with the initial client cohorts are broadly in line with the stated GK approach of 'walking alongside the client' - indeed this phrase was used repeatedly. However, in our conversations with the SCT, including managers, it has also been emphasised that the 'walking alongside' metaphor does not capture their approach entirely. Service Coordinators do not take a passive role, rather they are encouraged and empowered to identify and attempt to remove barriers where they can and actively support the client. It has been noted that this relies on a sensitivity to context and often a degree of

diplomacy from Service Coordinators, and also that it has been a learning process that the team are engaging with positively.

Another issue that has been reflected on, both within the SCT, as well as in the System Change Group, concerns the sustainability of the SCT's way of working with clients. An observation has been that Service Coordinators are immersed in spending time with clients more intensively than other agencies are resourced to. A question has been posed about whether this approach always entails 'walking alongside' the client through the system or whether, in some cases, they may be 'doing the work' of other existing or potentially required services.

Some reservations have been expressed that the approach of allocating a single Service Coordinator to clients may not be sustainable beyond the current Big Lottery funding and hence it is important to consider how this approach might be adapted or extended to build long-term capacity across the Partnership.

It is clear from our conversations with SCT members, however, that the aim of their approach to client work is not to duplicate or compete with existing service provision, but rather responding to an individual's needs and to enhance and improve clients' relationships to services to ensure needs are met. One Service Coordinator described the role as follows:

> *"We spend a lot of time chasing clients, being alongside clients, supporting them to get to appointments, remember things, chasing up other agencies that should be doing things for them. There isn't one other agency in Bristol that should be doing all those things…"*

There may, however, be a seductive quality to the role of a Service Coordinator, akin perhaps to the relationship between a therapist or coach and their client, which may benefit from further consideration. Whilst it may be rewarding to be seen as a trusted ally, or on occasion a 'saviour', there is a possibility that this kind of close relationship could create dependency that diminishes rather than increases the client's ability to navigate his or her own pathway towards wellbeing. This is particularly concerning given the earlier point about the likely absence of funding for this kind of service beyond the current Big Lottery grant.

The complex emotional needs as well as physical needs of GK clients require highly skilled support. Service Coordinator's no doubt walk a tight-rope in seeking a balanced way of working that puts the client need for trusted relationship at the heart of focus. Emotional labour is central to the work provided by all front-line staff, across all services, to those who are vulnerable with multiple complex needs[2] - an issue that is rarely recognised in the development of services.

The Service Coordinator Team meet together regularly, in a number of forums, in order to share learning. One particular area of challenge and learning identified by the SCT over the course of Year 1 was the need to be flexible and apply trial and

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[2] Hochschild, A. (1983) *The Managed Heart: Commercialization of Human Feeling*. Berkeley, CA: University of California Press.

error within evolving working processes, which may be quite different from those experienced in previous organisations. One team member summed it up as such:

"I would say that the most challenging thing is that nothing is straightforward; nothing is set in stone... So when you have a question, that would seem to be quite a straightforward question in previous roles or other teams, it's not as simple [in Golden Key], there are inconsistencies, and we will need to try things out."

Second Step have succeeded in establishing a highly capable Service Coordinator Team whose primary function is to focus on client relationships. Space has been given for these roles to emerge, and while at times it has been difficult for some SCT members to adapt, it is recognised that this new approach is required. Indeed the unanticipated space afforded early on in appointments enabled some SCT members to be able to focus on getting to know other partner agencies, a crucial ingredient of effective partnership working.

3.2 Recruitment of Golden Key clients

We move now to consider how referral and selection processes for the initial cohort of GK clients has operated, the rationale underpinning this and issues confronted. This section encompasses views from the Service Coordinator Team as well as referral and partner agencies, and service commissioners. The evaluation will focus on client pathways, progress and outcomes in the next phase.

Three rounds of referrals and selection have taken place in Year 1, following an initial 'test and learn' phase with a small group of clients from specific agencies to trial the assessment and panel process (see Table 1).

	Round 1	Round 2	Round 3	Total
Referrals received	36	100+	120	256
Referrals accepted	32	39	*Final figures not yet available*	71
Clients engaged	29	27	*Final figures not yet available*	56

Table 1 – Golden Key client referral and recruitment, at February 2016

3.2.1 Round 1 referral and selection

The GK Partnership, including at Partnership Board level, emphasised keenness for the SCT to be open to referrals from launch day. A key aspect to the SCT's initial work, therefore, was the development of a process for determining the eligibility of clients who would be selected from a pool of referrals. A threshold setting exercise to determine eligibility using the New Directions Team assessment tool (NDT Chaos

Index) was initially proposed in the Business Plan but was eventually rejected as it was felt to be to be inappropriate to the GK target population and client groups given its bias towards white males in the 35-44 age range, for whom it had been developed. There were also concerns that, with the then limited capacity of the SCT (only four coordinators recruited at that point), using the New Directions Team assessment tool to set thresholds of eligibility would not allow enough flexibility and choice in the selection of an initial GK cohort.

Instead, a six-person selection panel was set up comprising individuals who met criteria in the Business Plan, namely: two from SCT (including the senior manager), three from partner agencies (including one from a statutory service), and one IF Group member. This panel met and collectively made their selection decisions on a case-by-case basis. Other key decisions which were made about the process in Round 1 were: (a) to not make selection criteria public and (b) to anonymise all client data considered by the selection panel, since members of the target population were likely to be known to the panel. This approach was designed to focus on perceived level of client need rather than other possible criteria. In order to facilitate this, the panel reviewed the content of standardised notification forms that had been completed by a member of the SCT in discussion with a member of the team from the referring agency. These forms provided a summary of current and historic issues relating to housing, mental health, substance use and offending.

Round 1 yielded 36 referrals, of which 32 were accepted and 29 actively engaged. The remaining 4 were rejected as they did not meet the GK needs criteria. The vast majority of initial referrals and thus clients accepted were men (27 out of the 36 referrals). Half of accepted referrals (16) came from voluntary sector organisations, and the remainder from social services, the police, and Impact teams.

Our observations on this process point to an opportunity for GK to reflect and consider the potential strategic role of data, as well as the equal opportunities policy that was central to the Business Plan, to consider potential for informing the development of GK's targeted client recruitment. For example, detailed data now available from Bristol City Council shows that the rate of rough sleepers in Bristol has risen substantially over the last few years and that amongst these the vast majority are men aged 26-44[3]. A question for stakeholders that arises from exploration of such data is whether this could or should be used more actively to inform understanding of client needs by GK. For example, the majority of people with multiple and complex needs, as outlined by the national evaluation report[4], are also male. This raises some challenging questions in terms of equal opportunities and the most effective way of allocating the limited resources of GK given the programme's scope. For example, whilst women may not form the majority of those presenting as potential clients, it may be that the rationale for providing substantial

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[3] BCC Housing Policy & Contracts – Q2 (1st July-30th Sept) 2015-16 Homelessness Trends in Bristol

[4] Fulfilling Lives: Supporting people with multiple needs – CFE Research Evaluation Report: Year 1

focus and resource towards them is that children are often involved and/or that they may show better outcomes from such interventions.

Broader strategic questions arising from such an analysis might include whether the growing number of young men sleeping rough suggests a systemic blindness and/or City-wide inability to respond to this need? Such analyses might also help clarify questions surfacing around definitions for targeted clients of 'hard to engage' and 'hidden'. For example do those sleeping rough rather than those already within the services system qualify as 'hard to engage' and/or 'hidden'? Similar issues, of course, apply to those from black and minority ethnic (BME) groups. In other words, there is scope for a more nuanced approach to equalities and to continuously monitor and identify needs using data and research to test assumptions, leading to consideration of whether client selection processes can or should respond and adapt to changing patterns of need over the life of GK. Either way, validating and sharing the evidence base to support such decisions would be highly beneficial to the Partnership's reflections and learning over time and would facilitate mapping of demand for services in the City that looks beyond the immediate task and objectives of Golden Key.

3.2.2 Round 2 referral and selection

The call for Round 2 referrals, in Spring 2015, was targeted specifically – though not exclusively – at women, and young people aged 16-25. Around 20 additional clients were sought, for which over 100 nominations were received in the space of a week. By June, a total of 71 clients had been accepted onto GK (i.e. a further 39 from Round 2) of which 56 went on to be actively engaged.

The process of this second round of referrals worked somewhat differently, partly driven by learning from Round 1, and also to meet the targeted client recruitment objectives set out in the Business Plan. Three additional specialist Service Coordinators had at that point been specifically recruited to widen the Service Coordinator Team's work with women and young people. GK first briefed potential referring organisations and individuals over 2-3 weeks, including advice that they were especially (although not exclusively) looking for young people and women. Agency's intent to refer potential clients was requested by GK during this time. Next followed a one-week window during which referral notifications could be submitted.

On completion of the referral notification window separate panels were formed to deal with nominations for specific client groups, including representation as follows:

1. Young people (16-18 yr olds 'transitions' group): included Barnardo's Against Sexual Exploitation and 1625 Independent People

2. Women: included Missing Link and One25

3. Complex males: included Salvation Army (Logos House) and the St Mungo's Outreach Team

Given the high number of referrals a new way of categorising them was introduced at panel level, namely: Not eligible, Eligible and Eligible+. The 'Eligible+' category

was used for those who were deemed to be highest priority based on their extreme needs, circumstances and/or behaviour; the significant 'blocks and barriers' they face; or their 'hiddenness' (e.g. membership of under-represented groups, such as BME). In Round 2, sufficient referrals were received fitting the 'Eligible+' category to fill the caseload, meaning that those in the 'Eligible' category were not selected on this occasion.

A key rationale underpinning these changes to the referrals process reflected the intended desire of Golden Key from the outset to build in learning and make it distinct from traditional referrals processes used in the sector. This aimed to communicate the message that GK would not accept "just anyone" and that it would attempt to select and engage with clients with the greatest needs.

3.2.3 Round 3 referral and selection

In October/November 2015 Round 3 referrals began, with the intention of increasing the caseload and also targeting client groups considered to be 'hidden' and/or 'furthest from accessing services' (see also 3.2.5 below). A further 120 referrals were received in the notification window (around 60 eligible with 22 eligible+), with the panel selection due to take place at the time of writing. Specialist selection panels have remained as per Round 2, but with one new panel member added to each group to widen out participation:

1. Manager of Jamaica St Hostel.

2. Second Step high support accommodation.

3. A senior nurse from the Bristol Royal Infirmary Drugs & Alcohol Liaison team

Additionally, new IF group members have become involved in the panels to ensure there is always at least one IF Group member in attendance.

3.2.4 Stakeholder reflections on recruitment

It is clear from the documentary evidence that some agencies within the partnership initially reported a lack of awareness that referrals to GK had commenced. Furthermore, they also experienced difficulties in understanding the referral process, particularly during Rounds 1 and 2. A particular issue raised was how to provide sufficient information while ensuring client confidentiality. Some Service Coordinators experienced challenges due to the changing nature of recruitment and client engagement processes. However, the SCT management confirm that clear and effective processes are now in place – a view that is reflected by messages communicated elsewhere in the partnership, particularly at meetings and public events.

Individuals from agencies within the partnership have expressed some varying views and observations on the referral and selection process. For some, the conduit of Service Coordinators seconded from their organisations and/or with special expertise reflecting their own client focus has been a beneficial channel for referring potential clients. Service commissioners have commented that they see the SCT's

work and approach as positive and with huge potential, but that there is still enormous scope for GK to extend its relationships with service providing agencies by informing their frontline staff about GK, not least in relation to providing referrals.

Other service managers have reported some frustration, on the part of frontline workers in their agencies, at GK referral windows only being open for specific periods circa every three months. In particular there was some uncertainty about how referral and selection processes balanced need versus eligibility, and their degree of 'openness' against a focus on specific target groups, as illustrated in the following quote:

> *"It's frustrating for my workers to wait for [GK] referral windows to open…. They're not looking at GK as a research project, they're looking at it in terms of 'these are complex cases that need more support, now…so can we refer them to GK to get extra support and input?' When [GK] opened for the second window, they said they needed more young women… but then, if we had a white male who was 25 and who fits the whole GK criteria, well that's not who they want at the moment…"*

We, and many partners, recognise the challenges and learning that GK have experienced in formulating and adjusting the approach to recruiting clients, which is still in progress. However, it may be worth taking time to reflect on how the role of 'eligibility gatekeeper' has developed through the GK Service Coordinator Team, selection panels and other networks of relationships, where there is significantly more demand from referring organisations than GK can support. This is perhaps an inevitable tension, and a valuable reminder of the need for GK, but merits further exploration in order to identify learning opportunities, check alignment of recruitment strategy with GK's wider systemic strategic aims, and engage stakeholders optimally.

3.2.5 Recruiting 'hidden' clients 'furthest from accessing services'

GK's target client group has been characterised as those *'stuck in a revolving door cycle'* who repeatedly access services without changing their outcome. Our research found that this characterisation was understood by many stakeholders in accord with GK's stated vision. Another characterisation of GK's target population from inception is those *'furthest away from (accessing) services'*. Our analysis shows that stakeholders have various and competing interpretations of this phase as referring to those:

- who are in need but do not currently access any services;
- who have fallen or been locked out of services due to requirements set by service organisations;
- members of specific communities or demographic groups who are currently believed to be underrepresented in service use;
- accessing crisis, acute need, and/or emergency services who do not receive support to address their long term underlying needs.

The concept of 'hidden' clients has also appeared during our evaluation interviews, particularly in relation to the recruitment and selection processes, and in describing gaps in the current client base. The term 'hidden' was seemingly used initially as a shorthand for the phrase 'furthest from...', with a shift of emphasis onto the means by which such clients could be located and attempts made to engage them. The equality and diversity policy and underpinning research for GK's business proposal could of course play a key role here, alongside current national, regional and local research and planning data.

For some respondents, such definitions of 'hidden' clients represent the target GK population exclusively; they have emphasised that this is what makes GK distinct and 'not just another service': it seeks to engage a new set of clients, not those who were already accessing but needed better services. For others, the distinction is more nuanced: they see GK's aims as improving access to services for those 'furthest from' them but note that this may include degrees of detachment (physical or emotional) on the part of clients who may be well known to agencies, as well as barriers within services which stop some from having their needs met.

Several paradoxes have been noted by respondents in different positions within the partnership in relation to the challenges of defining, locating, recruiting and engaging clients deemed to be 'hidden' or 'furthest from (accessing) services'. Some within the Service Coordinator Team have noted that all GK clients thus far have been referred from service providers, adding that the amount of information GK required to consider them for selection has meant that they have had to be relatively well known to agencies. These respondents have also noted that selection criteria in terms of multiple and severe need have been set at a level which makes it unlikely that such clients would be entirely 'hidden' from or not accessing services. Reference was also made here to some characteristics of Bristol – a city with distinct populations of potential clients and an architecture of services catering to them – which makes complete 'hiddenness' even less likely. One stakeholder's perception was expressed that if the GK target criteria looks to include in future – exclusively or non-exclusively – 'hiddenness' or degrees of removal from services, then this is likely to also necessitate accepting clients who have less 'complex' problems (i.e. who meet fewer than three of the GK criteria).

Some individuals in partner agencies have questioned how people with multiple complex needs who have no contact with services are being identified by GK, and offered suggestions about particular locations in the city and organisations where they might be found. This raises the issue of those sleeping rough, for example, and the proportion of these who may in fact be unknown to services, at least in Bristol.

Additionally, it has been noted by some that (e.g. CFE National Evaluation Report – Year 1, p40) of the four needs targeted by the Fulfilling Lives programme nationally, only 'homelessness' has a clear definition shared across the projects: others are to be defined at project level, adding to the challenges of deciding upon both eligibility and how to target harder to access groups.

This complexity points to the need for client pathways to be mapped, which in turn will inform the process of client engagement. This is due to be incorporated into the next phase of the evaluation.

3.2.6 Establishing and maintaining engagement with Golden Key clients

There is strong, case-based, evidence that the GK approach is having a positive impact on the trajectories of successfully engaged clients. Particularly significant dimensions of this have been the SCT's intensive efforts to work with both clients and service providers (including on a multi-agency basis) to improve move-on options in highly complex cases. There is early evidence that having a GK Service Coordinator present may change the nature of both interactions and outcomes for clients.

There is also evidence of the need to form a process for dealing administratively and in practice with clients who have been referred and deemed 'eligible' for GK and/or accepted onto the initiative, but have either not been engaged, been engaged but contact lost (including through significant changes to the case such as long term prison sentences), or were not accepted during the referral window in which their notification was received. This issue has been raised for reflection and action both in the System Change Group as well as in our conversations and interviews with the SCT and GK Programme Team. It is unclear what stage this has reached at the time of writing, with the SCT addressing such issues on a case-by-case basis at the time of our interviews; however there was a clear commitment to ensuring more efforts are made and a process developed for offering help to such clients in the future demonstrating evidence of learning from the process.

A diversity and equalities strategy was drawn up as a significant part of the original GK bid to the Big Lottery, and commended by the funder. A strong view has been expressed by some partner organisations that it is time now to revisit this strategy and develop from it monitoring briefs, including with regard to the selection of clients and staffing. This view was endorsed from within the GK Programme Team.

Some Service Coordinators made reference to equality criteria being used in relation to the targeting of specific minority communities, the selection of clients, the 'blocks and barriers' process, and staffing decisions. None, however, made any specific reference to the existing Equalities Action Plan or other formal policies. It seemed that where equality expertise was a basis for client selection that this was perceived as individual Service Coordinator initiative, rather than a decision based on strategic planning. There is scope here to draw on the power of data analytics in conjunction with equality policy to clarify rationale (also see section 5.2).

3.3 Role and contribution of the Independent Futures (IF) Group

One of the specific features of the GK approach set out at its inception and detailed in the GK Compact is *'supporting a sustainable, authentic client voice though the Independent Futures (IF) Group'*. A specific aspect of this is the commitment to

'*...support the attendees of client feedback groups to inform service delivery'* (GK Compact, 5.1). Documentary evidence and interviews demonstrate that the IF group is functioning effectively in terms of providing a client voice. IF group members reported that they were really pleased with the direction of the group, and the impact they have been able to have on the broader GK project. Central to this activity has been the engagement of the GK administrative staff who are recognised by the group as proactively engaging IF group members to gain input. Despite a few occasions when they feel their views have been heard, but not actioned, the IF group members report a very positive experience in their work with the various partners and groups across the project.

> *"I mean, obviously you know about us being on the commission board so we go to the commissioners meetings, to the Golden Key so I mean we're really involved now and it's really, it's like at last we are there with them and it's nice; it's a really nice feeling".*

Several initial IF group members were involved with GK through its inception and the bidding stage, and the broader group has contributed regularly to assist in providing a client voice at key stages in the initiation of the GK project. In Year 1 the IF Group began formally working within the GK partnership, facilitated by a commissioned client voice organisation, Bristol Reconnect (facilitation contract awarded in Autumn 2015).

In Year 1 members of the IF Group contributed to the client pathway, including but not limited to, the following ways:

- In the initial referral phases, IF Group members made some referrals and signposted GK to potential clients whom they had access to
- Two IF Group members sat on the selection panels for GK referrals
- The IF Group worked with Second Step in a constructively critical way to review operational matters that may be perceived as problematic by service users. This extended to some shadowing of SCT members by IF Group members.
- Consulting with DHI about the design of the peer mentoring service
- One IF Group member collaborated with CFE as part of the 'National Expert Citizens Group' to conduct some peer research exploring the involvement of service users in recruitment

The IF group advised the Service Coordinator Team on their consent processes. As the GK project has evolved, so too has the IF group's collective sense of purpose and the nature of their engagement with GK stakeholders. IF group members have reported that they feel they now play a range of roles within Golden Key. A commonly reported role is that of a critical friend ensuring that GK is aware of when it may fall short in its approach to delivery. Specifically in relation to approach, the IF group see their presence at GK meetings as *'personalising or humanising'* the partnership discussions and ensuring the client voice is ever present. On occasion, a more robust and proactive role has been articulated, with IF group members describing a role more akin to a scrutineer. For some participants their role is to

represent the views of all service users in Bristol, and to hold the partnership to account – which in turn is experienced as a significant responsibility for the group.

IF group members also recognise their unique and central communication role within GK. Specifically, interviewees have talked about the importance of their role in reminding the partnership of the rationale for bringing together and connecting service providers (or GK partners). IF group participants report that they feel they have a key part to play in achieving this overall project aim through providing GK partners with tangible examples of the problems that arise for multiple and complex needs when service provision is disjointed.

> *"Our audience, we have two audiences. One is the partners and the service providers. We have to get them to see how beneficial it is for them to work together for service users. The second audience we have is the service users, and actually we need to be their audience. We need to get their stories, find out what their experiences are and forward that through the partnership to the service providers".*

> *"Our job is to point out why services need to connect to each other, give examples of that and hopefully show how that's benefitting people once it starts happening within golden key".*

However, the IF group also identify the important role that they play in communicating from within the partnership to external audiences from within the partnership. This includes the dissemination of information and raising awareness of the work of GK among future potential clients. There has been some concern raised about the coherence of messaging emerging from interviews with IF group members. Specifically, participants have questioned whether the potential value of GK has been effectively communicated to potential clients with the same energy that it has to partners. However, IF group members report that working with the communications lead within Golden Key has been very effective, and the group are now very pleased with progress on this front – particular the development of their communications plan and increasing their social media presence.

For a variety of reasons IF Group members have had limited direct involvement in the work of the SCT at this stage. The recently launched Peer Mentoring Service (see Section 3.4), however, is seen as a good opportunity by the Service Coordinator Team to incorporate individuals with direct lived experience into Service Coordinator-client relationships. Additionally, both the IF Group facilitator and SCT Managers report enthusiasm to broaden the client voice in GK's work with clients, possibly including transitioning current GK clients into the IF Group and/or by setting up other channels. It is hoped and anticipated that the first cohort of Peer Mentors and evaluation peer researchers will also include some current IF Group members.

IF Group members have demonstrated resilience and determination, despite struggles with the realities of changing membership, a diverse set of expectations and backgrounds and indeed ongoing complex challenges in their lives including

mental health, drug use and homelessness (factors that have led to at least two members of the IF Group stepping down from their role at Board level).

With recognition of the need for support to achieve the IF Group's goals, the GK Business Plan included facilitation, development and administrative support for the IF Group which has been commissioned by GK with involvement from the group. Bristol Reconnect[5] are now providing this service, a user-led organisation with the aim of championing the voice of people with complex and multiple needs. This new support for the IF Group now includes a part time administrator (currently based at Second Step), a planned office base from which IF Group members can operate, as well as a planned community café aiming to facilitate dialogue, and social and business connectivity.

To date the Group have played a crucial role in the set up and initiation phase of GK and have shown courage in speaking out at Board level as well as throughout the various structures and processes of GK. For example at Board level the Group have held GK to account, repeatedly raising appropriate questions in relation to the appointment of the Chair and offering a coherent argument for the development of an identity for GK which is separated from that of Second Step. An IF Group member also participates in the Systems Change Group with similar impact: a CEO of one partner organisation singled out the IF Group for their insightful contribution, particularly around questioning bureaucracy.

Whilst the IF Group are represented on the major elements of GK's infrastructure, given the significance of the 'user-led' voice in helping GK to see afresh the barriers facing potential clients, and in helping to shape the trajectory of GK, our evaluation surfaces a question in relation to whether the current structures and processes offer the best route for facilitating learning and opportunity for system change from the service user voice and the nature of IF group involvement in the future.

3.4 Peer mentoring service

Drawing on an initial needs analysis and consultation with the IF group, the GK Business Plan proposed a Peer Mentoring Service as a key method for incorporating the perspectives and strengths of individuals who have 'been round the system' into GK's relationships with clients. The vision was that such positive role models would offer a befriending and support element to help clients develop their aspirations and ambition, using language that clients can relate to, helping to get clients on board and starting to engage with services. This initiative was felt to be crucial to the overall success of GK's client work, and ideally incorporated into the beginning of the client relationship. In particular the peer mentoring was designed to ensure clients engaged with and stabilised in at least one chosen service, and began taking more control over their lives by making positive changes that would lead to improved wellbeing.

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[5] http://www.bristolreconnect.org.uk/

The proposal was developed drawing on the expertise and long standing experience of several of the partner agencies, notably Second Step, 1625 Independent People and Bristol Drugs Project who have successfully implemented similar initiatives. Initial decisions taken by the partnership to shape the delivery mechanism included:

- Each GK client to be offered a peer mentor, volunteer mentors to support one or two clients each.
- Mentors to undertake practical tasks such as accompanying clients to appointments, send reminders and check in with clients after appointments.
- Peer mentor role to be complementary to lead Service Coordinator, and the two teams to work closely and be afforded equal status in GK client work.
- Peer mentor team to be properly resourced, supported and managed – including volunteer coordinators, volunteer mentors being offered their own community mentors, and access to accredited training and qualifications.

Several options were considered for the management and resourcing of this aspect of the service, including direct employment and management of the Peer Mentor team by Second Step or another GK partner agency. The most preferable option (as specified in the GK Business plan) was for delivery of the service by an organisation external to the partnership, to be appointed by a commissioning process. This was to be a three-year contract, with the strong aspiration that by Year 4 the service becomes fully independent.

The commissioning process took place in the first half of Year 1 and the charity Developing Health and Independence (DHI) were successful in bidding for the service, with effect from 1st July 2015. A period of recruitment followed and the service was officially launched in January 2016 - with some IF Group members also represented in the first cohort of peer mentors.

A celebratory launch event provided an opportunity for GK stakeholders to share information about their services in a 'marketplace' style area and network with each other.   DHI facilitated collaborative workshop sessions gaining input and consideration from a wide range of stakeholders on the role and challenges of the peer mentoring service. The peer mentoring service shared a number of challenges with attendees at the event, including for example, finding enough suitable individuals able to commit in a voluntary capacity to developing stable relationships with clients, developing the necessary skills in peer mentors, and matching peer mentors with clients to both side's satisfaction. The GK Programme Manager and Service Coordinator Team Manager shared updates and successes so far and the Mayor of Bristol also spoke in support of GK's activities. The event was extremely well attended and can be seen as reflecting the continued appetite for involvement by partners.

3.5 Psychologically Informed Environment (PIE)

There is evidence from reviewing the organisational mission statements and publicity of GK partners, that the practice and physical environments of many

partners are already psychologically informed. However, it is also the case that there is considerable variation in practice and understanding of what it is to 'be psychologically informed'. This is entirely unsurprising given the relative infancy of the concept for many, but also, many organisations are in reality already operating in a very psychologically informed way - but would not necessarily describe or identify what they do as 'PIE'.

To elaborate on the PIE spectrum within the partnership, one partner has shared their organisation's own PIE framework, others clearly state their commitment to being psychologically informed and have staff who specifically monitor PIE engagement, while others report that they are still formulating their understanding of what their organisation might look like if it were to be a more psychologically informed environment.

Importantly, all referring partnership agencies who have been interviewed to date reported some understanding of the concept of PIE. Furthermore, GK is facilitating the development of understanding by offering training to partners. The evaluation team have attended a training session and have advised on the development of a training evaluation tool. The recruitment of another psychologist to the GK team has also been instrumental in progressing this area of the broader GK project. Specifically, the GK psychologist continues to deliver training and has now initiated a GK PIE group who will be further developing the GK PIE strategy – which in turn is expected to further develop partnership-wide understanding of PIE, and partners' alignment with PIE principles.

Given the aforementioned activities, the extent to which partners become increasingly psychologically informed during the life-course of Golden Key needs to be recorded by the Partnership. A key area of current evaluation activity in relation to PIE, is to support GK's progression of seeding appropriate means to capture PIE progress 'measures. An 'audit' tool has been developed by our evaluative team through collaboration with the IF group and GK PIE group. Partners are beginning to engage with this tool in order to benchmark the current picture in relation to PIE, and track distance travelled in future. It is anticipated that this will support GK in embedding its work around PIE as well as help to benchmark progress in the use of PIE and indeed help the collective learning of the Partnership around this central agenda.

3.6 Other client-focused activity

 GK's delivery plans set out a number of innovative pilot initiatives to be integrated into the activities of the Service Coordinator Team. The 'Tell Your Story Once' (TYSO) website, personal budgets (small budgets and also a full scale pilot of personal budgets) and two other innovation pilots in the pipeline involving multi-disciplinary teams and Business in the Community. As expected, these initiatives have been variously at scoping, planning, and initiation phases during Year 1, therefore we have not yet been able to collect reflections or outcomes data on their success. We

review below the plans and aspirations for them, and how they have progressed in Year 1.

3.6.1 Tell Your Story Once

This innovation is intended to respond to documented frustration from service users faced with the need to repeatedly describe their histories and needs to different agencies. There is evidence (including from the national BIG Lottery Fund's Fulfilling Lives partnership) that the requirement to retell their own stories to different staff across multiple agencies is significantly off-putting and may constitute a barrier to some in accessing services. The practice also represents an inefficient use of resources for staff at organisational levels.

The intention is to develop a technological platform via which engaged GK clients - in the first instance - can describe once in their own words their life-histories, current circumstances and needs. This information can then be shared with trusted agencies with the client's permission.

The IF Group has been instrumental in proposing and developing the plans around this initiative. Their view was that it could significantly contribute to positive engagement in services by clients, promoting ownership and recovery by telling their personal stories and giving them back control and humanity in their engagement with service agencies. Two workshops were held with the IF Group, the second including an IT specialist who helped the group explore how the technological platform could work. The group initially explored two options:

- A password-protected digital fob on which clients record and upload their stories in a preferred format (written, or video) and control who they give access to.
- A cloud or website based platform, with core information and additional narrative which clients control but to which trusted others – such as a carer, partner, or support worker – may also add documents or video to give a fuller picture of the important aspects of their lives.

Due to concerns about security and some practical constraints of a fob-based system, the web-based platform was preferred. Further meetings were held, including with the GK communications sub-group, the IF Group, a specific TYSO working group and website developers. A proposed approach was presented to the board in December 2015 for a three-tiered web-platform, representing three levels of access – each protected by a separate password:

- *Level 1:* Demographic information, a brief description and a photo (database format).
- *Level 2:* Detailed client information subdivided by area – aspirations, previous qualifications, achievements, need areas (document upload format).
- *Level 3:* Client's story, in the words of the client, family and friends (document, audio and video upload format).

Along with this presented approach, some concerns based on the Programme Team's research were outlined – notably that there is evidence mental health problems may be triggered by the process of trawling through negative experiences. Based on this presentation and the expressed concerns, the board recommended taking a new approach focusing on Level 3 and with steps taken to mitigate the focus on negative experiences.

3.6.2 Personal budgets

Built in to the business and delivery plans for GK's client work was clients' access to a Small Personal Budget of up to £500 in their first three years of involvement, held by their lead Service Coordinator and administered centrally within the SCT. This was proposed in recognition that clients often have very few practical resources and funds available to spend on items and services that can make a real difference. It was informed by good practice accounts from homelessness charities, where it was found that providing such small personalised budgets can start to improve clients' sense of control over addressing what matters to them.

The sorts of items identified by IF Group consultation and client focus groups at initiation stage included bus passes to reach appointments and move around the city, cost of gym membership/ access to sports facilities, massage and other stress-relieving therapies, small items of household furniture and goods to make a home. The IF Group proposed that there be minimal restrictions on what these budgets be spent on. They also suggested that clients have the option to pool part or all of their budgets on a jointly agreed project, which may facilitate clients building relationships, social contact, and peer support groups or networks. Additionally, small 'Service Budgets' were proposed whereby services could be purchased for groups of clients where economies of scale could be gained – such as blocks of counselling sessions.

We understand that the Small Personal Budgets initiative has been initiated within the SCT's client work in Year 1, and that experiences are being monitored to feed into the development of a Full Personal Budgets innovation pilot, currently at the stage of preparatory work before commencing scoping.

3.7 Key learning points and discussion questions

3.7.1 Key learning points

1. Recruitment of Service Coordinators was completed with frontline workers holding specific client group expertise seconded from 7 partner agencies. Seconded Service Coordinators are embedded in the activity and teams of their seconding organisations to varying degrees.

2. The Service Coordinator Team's activity has developed very positively with stakeholder interviewees praising their flexibility and approach to learning, particularly during the initiation period whilst new processes, systems, and protocols were developed. Whilst it is too early to assess the impact of this work on client outcomes, anecdotal case evidence suggests that their approach is having a positive impact, with GK clients remaining engaged and experiencing improved access to services.

3. Some reservations have been expressed about the extent to which the SCT's work is sustainable over time and/or sufficiently connected to and represented in wider partnership fora. The metaphor of 'walking alongside' clients is widely espoused but may not be an entirely accurate account of what happens in practice. It has been necessary at times to reiterate the intended GK approach of improving client's relationships to services rather than duplicating them.

4. The IF Group has formed well, despite many personal challenges among members, with good facilitation, and has developed a strong voice within both GK and the national Fulfilling Lives project. They have helped shape recruitment processes, been vocal on operational matters, and advised on aspects of the SCT's work. It is anticipated this positive start will be built upon, and that the IF Group's voice will be woven into the fabric of the GK partnership.

5. Much work has gone into developing and refining referral and selection processes with strong evidence of learning. These have taken place in three distinct phases in Year 1 with 71 clients accepted of which 56 have been engaged and a new cohort starting soon. Time establishing and refining new processes has been a necessary investment, with new assessment tools, policies, and protocols, involving expert input from key figures in specialist service provider agencies as well as the IF Group.

6. Whilst GK set out to recruit clients that were specifically targeted and has largely achieved this, there is clearly more demand than GK can meet for its services and so client recruitment inevitably has a 'gatekeeper' role. Whilst this was anticipated by the Programme Team and GK, there is some confusion among stakeholders about who is meant by potential clients who are 'hidden' or 'furthest from (accessing) services'.

7. The GK partnership has collectively expressed that it may be possible to do more to engage potentially 'hidden' clients, in line with its stated intentions to work with 'those furthest from (accessing) services'. This has proved a challenging undertaking, not least in identifying and defining such under-represented groups and raises some important questions to consider for future client referral and selection.

8. The SCT has made good progress in engaging a large proportion of accepted clients, but the nature of client's lives and trajectories has meant that not all have remained engaged. It has been flagged that a process is needed for handling such cases, and also those eligible clients who were not accepted during a particular referral window.

9. There appears to be limited use of data analytics and the equalities and diversity policy to help shape and test the wider strategic and systemic rationale for addressing needs of people with multiple and complex needs across the City. There is scope now to find ownership and further develop an approach to support monitoring impact.

Learning questions - Client engagement

1. What are the difficulties of engaging clients with Golden Key and how can these be overcome?

2. How can those closest to Golden Key client's experiences share their expertise and learning in the wider partnership?

3. To what extent does 'walking alongside' convey the nature of the Service Coordinator's relationship with clients and what other activities are, or could, they be doing?

4. Has Golden Key recruited and begun working with the type of clients it intended and to what extent has the referrals and selection process supported Golden Key's wider aims?

5. How can data analytics help Golden Key understand and define Bristol's population of people with multiple and complex needs? How might stronger links be made to the broader strategic picture and the equalities agenda?

6. How has the voice of client experience informed development Golden Key's work with clients and what more could be done to strengthen this?

7. Has Golden Key implemented the Equality and Diversity strategy outlined in the bid with regard to both selection of clients and staffing?

8. How can Golden Key demonstrate that it is not just another service for clients with multiple complex needs and ensure that all stakeholders recognise its distinctiveness?

4 Establishing Golden Key: Structures and processes

This chapter explores the pathway Golden Key is evolving in shaping its identity and impact through structures, ways of working, actions and discourses.

4.1 Golden Key Partnership Board

The Partnership Board is a consortium of organisations that provides strategic direction and governance for Golden Key.   Members include senior-level representatives from Avon & Somerset Police, Bristol, Gloucestershire, Somerset & Wiltshire Community Rehabilitation Company (BGSW CRC), Avon & Wiltshire Mental Health Partnership Trust (AWP), Bristol City Council (BCC), Bristol Drugs Project (BDP), Bristol Clinical Commissioning Group (BCCG), Missing Link, 16-25 Independent People, National Offender Management Service (NOMS), Second Step, St Mungo's, Stand against Racism and Inequality (SARI – attending annually), BIG Lottery, Business in the Community (BiTC), and representatives from the IF Group (citizens with experience). In the early stages of Golden Key the Partnership Board was chaired by the CEO of Second Step. This was a pressured time of juggling establishment of GK processes and ways of working while also accounting to the Big Lottery with the role of the Board at this point more managerial reflecting the nature of the most pressing concerns.

In Autumn 2014, once the shifting realities of the start-up phase had hit home, the GK Programme Team recognised the need for a revised budget and a review of the Board's commitment and strategic role. The budget reconsideration was largely attributed to underestimating the programme management 'hub' resources required to provide the necessary capacity for coordinating implementation. The Big Lottery were challenging in their questioning of the role of the Board in response and agreed a revised increased budget. This was a significant juncture for GK and the following appointment of an independent Chair in April 2015 to the Board was crucial in the journey of GK. Our observations and interviewee comments reflected that this reinvigorated the board, bringing clarity of role, increased commitment and openness to seeing afresh to ensure the Partnership play its role in harnessing the collective leadership present at the table.

A wide range of organizations and stakeholders are represented at the current Partnership Board table with improved attendance following the appointment of an independent chair from June 2015 meetings onwards. An analysis of Board meetings over the last year shows that attendance by statutory agencies is slightly more consistent than those in the voluntary sector. In this respect, size of organization does matter since large statutory partner agencies, such as Avon and Wiltshire Mental Health Trust and Avon and North Somerset Police, can in theory relatively more easily afford to support participation at the Partnership Board, GK

events and meetings than smaller voluntary sector agencies such as Addiction Recovery Agency, Stand Against Racism and Inequality, and One25.

IF Group members have been consistently present despite often having to deal with challenging personal circumstances. The challenge for the IF Group in being present and fully heard is even more significant given the GK aim to ensure people with lived experience are at the heart of it since the majority do not have professional backgrounds, are not used to making sense of a large number of complex documents and vocalising their thoughts in a large room surrounded by professional stakeholders whilst struggling with the day to day challenges of mental health issues, addiction and homelessness.

In other words, all is not equal around the Partnership Board table and this may shape the nature of the discourse, ability and indeed motivations for various stakeholders to engage. These challenges are critical influencing factors for successful collaboration and engagement and raise important issues for GK to consider.

4.2 Golden Key infrastructure and ways of working

From inception, formulating the GK Fulfilling Lives proposal was championed and led by Second Step, drawing on a rich experience of Bristol's statutory and non-statutory service providers. The programme's very existence owes a huge amount to the personal and professional relationships, experiences, vision, and influence of Second Step, together with other key stakeholders, across the city, established over many years. Second Step is distinctive from any other stakeholder since, in addition to being a Partner, they are also the 'lead' agency for the programme. In this context, Second Step has certain formal governance responsibilities and accountability for GK with the legal 'grant agreement' being between Second Step and the BIG Lottery Fund.

Overall project governance and strategic direction is provided by the Partnership Board (meeting quarterly), which includes senior level representatives from GK partner organisations, the Second Step CEO, the BIG Lottery and members of the IF Group. In signing the GK Partnership Agreement, partners have formalised commitments to certain other activities specified in the GK Business Plan (e.g. secondments, expert advice) and participation in the Partnership Board. The GK Partnership legal agreement stipulates that delivery of Golden Key will be achieved through the Partnership working together. The Partnership Board Terms of Reference also details responsibilities and how partners are expected to participate, though states that the partnership has *"...has no formal legal status" (Partnership Board Terms of Reference v7, p2).*

Throughout this first year the Golden Key infrastructure has been developed and refined. The Programme Team, responsible for the day-to-day running of GK, is housed at Second Step and offers a range of project management, administrative, commissioning and contract management, data monitoring, and communications

functions for the wider partnership. Client engagement is provided and managed by the Service Coordinator Team, also hosted at Second Step but including staff seconded from partner organisations (see section 3.1).

Alongside these functions there is a System Change 'working' Group (meeting monthly) whose purpose is to initiate lasting systems change in the partnership, a Commissioners Group (meeting 3 times a year) that engages with those responsible for commissioning services across Bristol, an Evaluation Advisory Group (meeting quarterly), a PIE network group, a Communications Panel (meeting bi-annually), a Service Action Group, and a number of 'innovation pilots' and associated initiatives. A visual map of GK's structure is provided in Appendix 2, along with a diagram showing both the ambitious scale of GK as well as the scope of the evaluation in relation to it.

Parallel streams of activity identified from the Business Plan have been largely organised through the establishment of a number of groups, working groups and sub-groups, as outlined above. These groups are comprised of: members of the Programme Team, Service Coordinator managers, IF group members, representatives from partner agencies, and other stakeholders – ultimately reporting to the Partnership Board.

GK has sucessfully accomplished the necessary development of a clear framework for its activities at the start of its journey. However, our evaluation surfaces a number of tensions and potential contradictions between the articulated hopes and ambitions to promote disruptive change, an understanding of the 'wicked' and complex nature of the systemic challenges being tackled through GK versus the conventional 'business-like' and somewhat hierarchical modus operandi of the structures and processes that may not necessarily best facilitate the next phase of GK's progress.

Some recognition of the need for emergent approaches when dealing with complexity was apparent in the revising of GK plans and finances in the early stages, which gained full backing from the Big Lottery after a thorough review. Indeed the Big Lottery have since reiterated their recognition, understanding and support for the inherently complex and emergent nature of GK's work.

Whilst there is further evidence of allowance being made for adjustments of key processes and some learning (such as the recruitment of clients and the 'blocks and barriers' process), the fundamental set up of GK is premised on an implicit mechanistic understanding that the Board sets strategy, and that this is operationalised through the Systems Change Group.

Other challenges implicit in the current model and way of working include a separation and reduction or distilling of the various stakeholder conversations, dialogue, and exploration of the nature of the challenges, into compartments and smaller blocks which means that focus of understanding may be distracted from the larger picture. Very real external pressures for example in accounting to Big Lottery, meeting targets, play their part. However, so do the cultural pressures of operating in conventional hierarchies, which bring neatness to otherwise more potentially

complex or indeed challenging ways of working. There are real tensions and issues surfacing in the current approach as articulated by a number of stakeholders:

"I think hierarchy and structure give people some security and it frees them up to do their job, and so it can be a good thing. But then you've got a lot of things that feel a bit too top down, partly because things are changing within services."

"Get some evidence, write a report, present to the board, and it then takes 6 months for anything to happen ... is this the most effective way of making changes and learning from experience?"

Pressures in the set up phase, particularly for Second Step in leading the bid and making GK real were phenomenal. Second Step have achieved the engagement of partners, the establishment of infrastructure and support (which was initially under-recognised and under-funded), and processes and routes for accountability and ways of working. The challenges in achieving all of this whilst balancing the needs and interests of Second Step and the broader collective partnership should not be underestimated, reflecting the standing of Second Step amongst the community of service providers and wider City stakeholders.

Whilst the strong leadership, passion, resilience and determination of Second Step were crucial in the initiation and development of GK, at this juncture, more than a year on, some stakeholders, including the IF Group are questioning a perceived strength of Second Step's influence over strategic direction and indeed independence of GK in representing a collective voice. This perception has been voiced at Board level and elsewhere in questioning the lack of a dedicated GK email, phone answering, or indeed separate office location for example, which would symbolise to clients and other stakeholders the existence of GK as distinct from Second Step.

4.3 The System Change Group

The System Change Group (SCG) met for the first time in January 2015 to coordinate the operational activities of the GK partnership. It was initially called the 'Operations Group' and renamed System Change Group in June 2015 to acknowledge the central role of this group in initiating systems change in how services engage with clients. The SCG terms of reference were drafted in February 2015, following a discussion in the first meeting, and then after significant amendments, were updated alongside the name in June 2015.

4b. System Change Group

The System Change Group is responsible for effecting lasting change through effectively managing blocks and barriers identified within the programme. It will:
- Champion the vision for Golden Key as established by the Partnership Board
- Be responsible for the blocks and barriers identified by or presented to the group
- Support the establishment, development and refinement of processes to identify, resolve and or escalate blocks and barriers effectively

Source: Golden Key Operational (System Change) Group Terms of Reference, June 2015, p5

The SCG welcomed clarity of role and the overall remit of the group which included specific and notable reference to its work in relation to 'blocks and barriers':

> *"…managing blocks and barriers within the programme and identifying and sharing innovation and learning. This includes identifying, isolating, resolving and or escalating any blocks and barriers identified and identifying, monitoring and presenting innovation and good practice." (Operational Group Terms of Reference, June 2015, p3)*

The SCG meet monthly and are comprised of:

- **IF Group representative(s)**
- **GK representative(s)**
- **Non-statutory service provider representatives from 8 organisations (Second Step, Bristol Drugs Project, Missing Link, Addiction Recovery Agency, St Mungo's, Salvation Army, and One25)**
- **Statutory service representatives from 3 organisations (Avon and Wiltshire Mental Health Partnership, Bristol City Council, Bristol, Gloucestershire, Somerset and Wiltshire Community Rehabilitation Company).**

Whilst the positive intention is clear that the SCG are fundamental to facilitating change the Terms of Reference implies an approach to creating change that sees the barriers and much of the possible solutions emanating from operational level.

Underlying tensions as noted earlier were palpable at the outset of the Group's formation as stakeholders tried to work out what GK was all about and what it might become. Whilst these tensions were not explicitly acknowledged within the meetings themselves, relationships and open dialogue around the table appear to have improved over time. Our observation is that the role of the Action Learning Set (ALS) commissioned by the Programme Team as set out in the GK Business Plan specifically to support the SCG has been important in this respect. There was initially some surprise and perhaps suspicion expressed of the Action Learning Set, perhaps because it was introduced by the GK Programme Team rather than initiated by the SCG members themselves. In addition due to pressures on members of the Action

Learning Set, participation has been limited and intermittent. Despite these factors though, it is interesting to note that the evaluative reflections of those who did participate has provided significant relational and system perspective gains for GK through its focus on reflective learning, active listening and collective problem solving:

"I shared an impression with the group at the November session that there appeared to be a gradual shift in emphasis in discussions in the ALS between the first to the third sessions. To begin with, the topics that engaged participants in the earlier sessions focused mostly on challenges and dilemmas that colleagues were experiencing as individual managers. However, by the third session, the main focus was on the overall system opportunities and constraints across the partnership (though this exploration originated in the individual issues that managers brought to the table). This emphasises that ALS programmes work – consciously or unconsciously - at three levels: the individual; the ALS group dynamic; and the overall system." (ALS facilitator)

"A better understanding of how partners work and opportunities for working together to avoid duplication and gain better outcomes for client. A greater commitment to finding new ways of doing things and to questioning existing systems and practices without being defensive/protectionist." (ALS participant)

These reflections hint at the importance of a distributed understanding of leadership in which all actors can (when encouraged) both see and shape the bigger picture from wherever they are within the system. They also point to the significance of relational work as fundamental to building trust, voicing truths and tackling the problems named.

Indeed several participants of the SCG commented on their expectation from the start that the group would more actively challenge behaviours and activities. However, the issue of trust is not to be underestimated since it lies at the heart of collective willingness to speak 'truth', to acknowledge, to enquire openly and to act to change[6]. Many approaches to change fail because they are either blind to the emotional labour needed and/or do not have the skill set required. The following brave comment epitomises just some of the sensitivities in speaking out:

"The guy from the IF group on the SCG is really great at inputting to our meetings and that feels really strong. There are issues around disclosure there though that I'm wary of when I'm at those meetings... it's clear that there are some things I can't say in front of a service user, or potential service user, or even someone who's been through the system in the past."

As planned, the Action Learning Set have met 4 times since July 2015, with another 2 meetings planned up to May 2016 which suggests a positive impact on partnership working is already being effected. Perhaps the broader learning from this for the

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[6] For example Torbert, B. et al. 2004. Action Enquiry: The secret of timely and transforming leadership

SCG, and indeed GK more broadly, is that relational work matters. So whilst a substantial proportion of time at SCG is currently dedicated to updates around the table, this is an important element of development of understanding both of GK developments and each other. The question that perhaps arises from this is whether the meeting process itself truly supports a collaborative or more hierarchical endeavour and whether it could afford explicit space for building understanding and trust other than that afforded by the Action Learning Set? In other words, how can GK learn from the principles built into action learning?

4.4 'Blocks and barriers' as agency for change

The core assumption of the current model and way of working is that the Systems Change Group is central to tackling the systemic difficulties that get in the way of reforming service around need. The current way of working stems from the ongoing relationship of the Service Coordinators with GK clients, who in 'walking alongside' are in theory well placed to identify, code and record blocks and barriers as they arise in 'real time'.

The approaches to identify and attempt to address blocks and barriers have involved a significant investment of time and thought by the Programme Team to analyse issues arising from the data. Activities have largely rested with the Service Coordinators and Programme team, which has then meant bringing the 'findings' in varying forms to the Systems Change Group's table. The initial stages of sharing findings has proved sensitive in revealing concerns captured by Golden Key Service Coordinators that have stemmed from clients but which sometimes reflect poorly on individual organisations (who may or may not be represented around the table). In this situation, developing real trust is essential as defence is often a natural response.

Those involved have demonstrated learning in developing this process, which has been adapted over time shifting from a focus on 'consistent unsolvable problems' faced by GK clients, then moving to a case study approach, with involvement of SCG members, Service Coordinator Team Managers, and the Programme Team. The approach using case studies has since been further refined. Indeed in looking at the case studies, several members made reference to changes evident in how GK client cases were dealt with leading to new positive practical outcomes.

However the fundamental route and approach of the Programme Team and Service Coordinators holding the work of 'blocks and barriers' has not been substantially altered to enable members of the SCG to feel ownership in taking action:

> "Case studies have been interesting, as most of them have a [history relevant to my role/organisation]… but for some other agencies/ individuals there…I think they can struggle to see the relevance of it, and to have an input…it's quite time consuming and doesn't always seem relevant – especially if it's not actually changing things in practice, we're just acting as a sounding board for the Service Coordinator Team."

From the Programme team and some SCG member's perspective, the case studies were understood as a useful tool to facilitate discussions and develop trust within the System Change Group at a particular stage in the process. The use of case studies is now planned to take a back seat as data from the categorisations becomes available and broad themes such as professional communications, arising from the analysis now form the primary focus with partner agencies encouraged to reflect on these and bring back observations and responses from their own organisations. This latest approach gained much positive support at the meeting from SCG members who liked the action-focus.

There is a danger however that the new approach to identifying 'blocks and barriers' loses the context brought by working with the original real case studies leaving the interrelated nature and broader pattern of issues hidden. In February 2016, it was agreed at member's request that the Programme Team would share blocks and barriers data for each theme pertaining to each member's organisation reflecting a greater degree of trust and willingness to learn and explore underlying issues:

> *"Personally it's been about learning and about being able to link in with more senior people in other organisations, and also being able to communicate to people at that level about [our organisation] and all the changes in it."*

There is no doubt that the Programme Team together with the Service Coordinators have worked hard to generate robust data to inform the core work of the Systems Change Group and the Board. Primarily starting in 2015, to the end of February 2016, a total of 484 system change events have been recorded and coded thematically.

The coding process, now involves tiering according to the nature of perceived resolution, sector and underlying reasons. The nature of interpreting complex client situations and experiences with services to code data is of course not simple and some members of the Systems Change have expressed concerns around the need for recognition of this complexity to avoid the dangers of reductionism to oversimplified versions of 'truth'.

There has been significant learning and development along the way in the approach to capturing 'blocks and barriers' including a shift to capture enablers and facilitators of change and good practice and current plans include involvement of other stakeholders to log 'system change events'. A small working group of Service Coordinators has now been established to focus on 'learning events for lasting change' that shares learning back to the Service Coordinator Team monthly at team meetings. A GK Learning Forum event also took place in June 2015, attended by a total of 43 frontline staff including the SCT, representing 15 partnership agencies and the IF group. This had the intention of pooling and sharing expertise and experience, strengthening the partnership, and reflecting on how to work collaboratively towards systems change.

However there are important questions concerning the degree to which the current process facilitates timely trouble-shooting and understanding of seeing and tackling the bigger systemic 'elephant' and to what extent it may ironically be creating a self-

limiting and siloed view of the world? The 'elephant' here refers to the bigger picture that only becomes visible once the data enables it to be seen. Examples might include the bigger picture of rising demand/need that might illuminate causes of homelessness or complex needs, the role of funding in shaping services, or the pattern of current provision.

> *"There's also an element of us starting to be able to say, for instance, 'this is about housing' and then the housing person goes off and sorts that out or follows it up. But what's not happening is us all being able to look at things together, strategically."*

> *"I can't change things on a systemic level myself, only on a day to day level within my team…"*

> *"It doesn't feel like things we discuss and identify are getting escalated either to the Partnership Board or to senior levels with the agencies represented. I haven't heard of any one thing being escalated like that yet and that is what needs to happen to get the change to happen."*

Indeed a recent summary presentation of the blocks and barriers data to the Board as a starting point prompted a similar response from Board members who are keen to gain visibility and get to grips with the strategic implications.

Perhaps the potential difficulty of this bottom up approach is that it implies a causal model wherein the majority of problems stem from the front line of delivery. There is a risk with the current processes of a focus on ironing out difficulties in the existing system rather than encouraging fresh questioning for disruptive systems-wide change. Perhaps this is because the approach as it stands relies on building 'bigger picture' evidence from deconstructed small building blocks rather than considering the nature and potential framing of structural and systemic barriers such as the impact that commissioning processes have, or the degree to which leaders of significant stakeholders make GK their core business or not in a highly competitive environment.

If GK is to build on its moves towards widening engagement of stakeholders in identifying and addressing systemic barriers, how might it do this and how might it capture the data, provide timely analysis and engage partners across GK in dialogue to support broader learning? Might GK for example consider new forms of software that enable 'real time' coding and pattern spotting using smartphone technology?

Further, the extent to which the voice of the IF Group has registered within this process may be worth reflecting on. Could the IF Group potentially play a greater role in articulating knowledge of blocks and barriers facing would-be service users? For example through commissioning the IF group to conduct a systematic analysis as one option? Indeed the IF Group have already been invited by the Commissioners to assess the scope and range of user consultations across the City. Could there be scope here for GK to create synergy and make the interconnections between the various currently separated strands of focus?

If GK were to adopt an understanding of tackling 'blocks and barriers' within a complex adaptive and/or systems framing, what kind of language might be used? Where and how might GK then focus its activities? What kind of journey might GK begin to embark upon and what kinds of tools, approaches and understanding might need to be considered?

4.5 Stakeholder perspectives on Golden Key

Given the range of stakeholders involved in GK it is perhaps not surprising that there are differing views as to what Golden Key is about and also that not all stakeholders are clear of their own role with GK. At Board level there is an increasingly voiced view that GK is 'a shared way of working', an approach, rather than a 'thing' or a project or service to deliver. Certainly the stakeholder workshop held to explore leadership for GK underlined this view. However in practice, many stakeholders use the language of either 'rolling out' a project, or seeing GK as apart from their own organisations and belonging to 'them' i.e. Second Step, a kind of project they should be engaging with somehow:

> *"So I think what **they** really need to is review **their** progress in the first year and see what **they've** done against their goals, but also to see what other agencies think about what **they've** done – because they may say 'oh we've hit this and we've achieved that' but it might not match with what the other agencies want **them** to be doing."*

And as highlighted in Chapter 3 the process of recruitment of clients and role of the Co-ordinating team for example reflect the tensions involved of finding a shared way of working. On the other hand some stakeholders see GK as a form of experimental learning and action research, perhaps reflecting the influence of the evaluation approach:

> *"In terms of what Golden Key is or means, because to me it's a research project, and the important thing is are things being learnt from it– are we helping to identify and then solve problems to help stop them cropping up again and again? And I don't think we are yet. It feels like we're still working case by case, then moving on again. Change isn't yet happening across the board."*

We have also noted a perception among some that GK reflects the culture of the voluntary sector highlighting a sense of difference or lack of resonance. Indeed several stakeholders have described the Bristol scenario as 'tribal'. Given the very human need to find shared identity, and the challenge of working with so many different perspectives perhaps the question that arises is how can GK recognise and work with difference creatively to maximise the value of this diversity of thought?

There is growing recognition within GK of the importance of working both vertically and horizontally across key service provision. For example one partner stakeholder engaged in the System Change group felt there is a particular need to work with the

Children and Young People's Services (CYPS) at strategic as well as operational levels.

> *"It would be useful to see … what effect operational changes agencies might make would actually have. But also to see if we're missing agencies round the table at the SCG. I don't know if it's been done or not. For instance, I don't know why CYPS aren't on there. You're telling me that people with chaotic lives aren't involved with CYPS? I'm thinking about care leavers, but also people who've got children, even if they're not living directly with them, who've got child protection issues. Because GK could have a massive impact on the child protection plan. There's often a big gap between child and adult services, and that really needs to be joined up."*

The GK Chair has extended membership to bring in crucial voices from sectors previously missing including the National Offender Management Service (NOMS) and has instigated a timely review of membership in moving forward.

GK might wish to consider the question of how to extend its reach and learning through engagement with a wider pool of expertise to challenge and broaden thinking? Sources for learning could include the RSA's work around health as social movement and the role of technology in creating community among several possible areas of exploration[7].

GK could consider exploration of its own theory of change through exploration of the work of others from a diverse range of providers locally, nationally and internationally. For example in the U.S. two creative projects in different States [8][9] have focused on building very small houses for those without homes followed through with multiple services.

4.6 Challenges of working together in a competitive marketplace

While the developments in GK's work to date are highly positive and essential in the galvanising of collective armoury for change, there are some notable challenges facing GK in its work across the partnership and indeed the wider City. These include the market place reality of competition and reducing government resource for public services, which means that GK partners are straddling the uncomfortable tensions between wanting to collaborate for positive change whilst having to be mindful of painful organisational financial realities and often pressure of personal job security.

The respective roles and perspectives of stakeholders within GK and across the City also matters. For example within the current GK picture the role of commissioners

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[7] See, for example http://www.thepowertochange.org.uk/about/

[8] https://ourfuture.org/20140117/utah-is-ending-homelessness-by-giving-people-homes?gclid=CLfPrab26ssCFcO4GwodZJYL4w

[9] http://america.aljazeera.com/multimedia/2015/4/building-miniature-dream-houses-for-the-homeless.html

is pivotal since they hold the purse strings, and determine requirements for delivery and accountability. Whilst Commissioners express a desire to see creative solutions, different thinking, innovative approaches and fresh collaborations to support commissioning objectives the perception of other stakeholders is that short term planning and funding cycles together with competition to run services make this difficult. And indeed in mapping the GK system we might ask whether co-creation of new services is truly possible if commissioners and funding play such a powerful role in setting the trajectory of service design? And what role do those with lived experience play in shaping this powerful relationship of commissioning and provision? Might the pilot of individual budgets (currently in its infancy) fundamentally change the role of service providers and what impact will this have on the wider service market place?

Whilst stakeholders were able to articulate the tensions they experience in espousing their belief in the significance of GK, they tempered this with recognition of the part that competition and scarcity of resources plays in realising GK's ambitions. Several stakeholders believe that competition for funding is especially fierce in Bristol describing it as 'tribal' and that this has a direct impact on the potential for real collaboration:

> *"Golden Key is special… a lot of the agencies are in competition with each other and so it's very strange… there's all sorts of strange tensions and politics going on all over the place…. people negotiating power … there's always a lot going on under the surface."*

> *"Some differences are noticeable in that the group is diverse in terms of statutory and private but it's dominated by voluntary sector and of course the issue is that they need commissioning to keep going… And there's been some discomfort about willingness to share things as it might affect their commissioning. I've definitely felt that strongly… Perhaps not so much now, but certainly at the beginning."*

Tensions were particularly apparent at the early meetings of the Systems Change Group in relation to discussions of the 'blocks and barriers' and have surfaced on occasion at Board level, particularly in the early phases of work. Indeed GK has formally identified competition as a 'strategic risk' for monitoring as part of the risk register, yet there is little evidence of any safe space (aside from the action learning set for the SCG) having been created to explore the nature of this and its impact if not fully articulated.

Stakeholders are though in agreement about the need for GK in Bristol. Most expressed positive views about GK's activities, whilst acknowledging the task is complex and challenging. There was general acceptance that the approach needed is emergent, and will take time though some inevitably feel that the pace should be quicker. One example given was the time taken to understand the role, purpose and activity of the System Change Group. Those in a more senior position at GK partner agencies were most likely to mention their frustration particularly during

the earlier stages of the programme, perceiving an emphasis on reflection, planning and learning, rather than 'doing':

"I appreciate it isn't one of those things that's going to change overnight or in some cases probably years, and the whole environment or government could change whilst it's going on, but I do feel it's very slow... overly reflective."

Whilst some frustration was expressed about the early stages of GK there was a sense that, as clients were recruited, GK began moving from 'set-up' to 'action/delivery'. A turning point occurred at the end of summer 2015 clearly signposted by the appointment of the new Chair of the Partnership Board:

"A lot so far has been caught up in the mechanics of set up and that can be a bit tedious, I think we are moving into another phase now, the fun starts now…"

GK has worked hard to proactively communicate its work and successes through a range of channels including: GK organised events, updates from the Programme Team at group meetings, monthly reports to Partnership Board, meeting minutes, 2015 Learning Forum report, GK quarterly e-newsletter, the GK website, Twitter, local radio, local events and initiatives related to the multiple and complex needs of GK's client group, and other informal channels.

Concerns however were raised by some partners to the GK Chair and Programme Team about attributing successes in the first newsletter to GK. A feeling was expressed that GK was somehow cashing in on individual partner achievements. This issue highlights a mindset of 'us' and 'them' and suggests that a notion of collective achievement is not yet at the forefront of partner thinking. It underlines if anything the relational partnership ground work GK needs to focus on in moving forward to create a shared narrative of excitement and success. Questions arising from this may help GK in taking this agenda forward. For example how might shared success be articulated by partners of GK? What would it look and sound like and how will it be generated? Will shared narrative represent a collective sense of shared purpose? How might GK begin to use the power of narrative to shape the future?

4.7 Creating, accessing and sharing data across Golden Key

So far, good progress has been made in establishing a comprehensive and flexible database within Second Step which facilitates client tracking. However, at present this cannot be directly accessed by partners owing to incompatible data sharing protocols. There appears to be little data exchange with agencies not directly involved with GK, though at Board level the issue of the need for data sharing is being increasingly recognised.

It should be said that the evaluation team are at an early stage in engaging with the systems which exist for recording GK costs and allocating resources reflecting delays and challenges experienced by the GK programme team in progressing data systems. The original resourcing plan in the GK Business plan has understandably

been adapted to reflect practice as the project has unfolded (e.g. revising project coordination 'hub' costs).

The UWE team will in due course be providing analyses of partners financial and resource data as part of the Social Return On Investment and economic impact assessments. As far as possible, this financial data collection will be dovetailed with existing partner financial management systems in order to avoid imposing unnecessary workload. At that stage, it may be an opportunity to improve cost and resource control systems to provide the data necessary for the economic evaluation and to give partners effective cost control systems where these do not exist. This element of the evaluation is likely to test not only partner commitment to the evaluative process, but also commitment to pooling data to gain collective intelligence.

In an ideal world, GK financial management and data systems would be compatible and shared across GK partners. Key questions include consideration of how accurately existing financial management systems capture costs incurred as a result of GK activities and whether a system of resource allocation based on actual costs incurred might improve the collaborative working by GK partners? An alternative system might entail:

- The facility to record partner activities and client interventions as part of GK and associate resource costs with these. This could be on a standard cost per unit of activity basis. It may be most appropriate for this to be a simple add-on to GK's existing 'InForm' data system. Activities could be expanded to include attendance at meetings, participation in workshops etc.
- Distribution of GK funds based on periodic reports from this financial data system to provide a lasting means of assessing effectiveness through comparing beneficial outcomes with associated costs.

At present though GK is in its infancy in recognising and using the potential power of data for strategic cause, though there are good signs of emergent realisation for example as cited earlier in this chapter in relation to the use of 'Blocks and Barriers' data at the recent Board meeting with a request to look at aggregated pattern rather than 'atomised-data'. As discussion developed one partner commented that since *"housing is the foundation to get things right, and we are always chasing our tail so that it costs more in the long run, could there be an assessment around housing in our systems change work?"* A further question has been raised around how to engage with the wider City and how to learn from other Cities such as Plymouth.

Barriers to development of effective data intelligence include multiple data collection systems and lack of access to centralised unified intelligence by all partners which facilitates and captures client pathway tracking (this issue is explored further in the following section on City Wide Engagement).

Links and data sharing protocols are not in place with other agencies in Bristol not directly participating in GK so at present any client pathway tracking cannot capture services clients may be engaged with outside of GK operations. In other words data systems are currently designed from governmental and institutional perspectives

rather than designed to illuminate the broader patterns of service engagement and client need from a service user perspective. System change should extend the concept of collaborative working across all relevant agencies and providers and data sharing would be an essential first step.

Perhaps GK could facilitate an understanding of the potential collective power of effective and accurate data collection and analytics by leading an enquiry as to whether existing data management systems are working for partners? This might also include mapping of agencies that are engaged with clients beyond GK to help consider the potential for wider data sharing as a basis for long-term collaborative working across the city? This would represent a City wide 'win' for GK as well as facilitate collective leadership of place.

4.8 Key learning points and discussion questions

4.8.1 Key learning points

1. Second Step and GK partners have invested significant organisational and personal resources in the design and development of the BIG Fulfilling Lives programme in Bristol. This in itself is a significant collaborative achievement and testament to the passion and commitment of those involved.

2. The role of the Partnership Board is crucial and has helped to ensure strategic direction and engagement of key partners around the table. A current review of membership has been timely. The Board's role in facilitating collective ownership of GK and finding new ways to foster shared leadership is central.

3. The appointment of an independent Chair in April 2015 represented a pivotal juncture for the GK Partnership Board, which has brought clarity of role, increased commitment and openness to seeing afresh. The Board is starting to take ownership of strategy, exploring the potential potency of the collective leadership present at the table.

4. Involvement of key partners, in particular Second Step, has had a strong influence on ways of working and strategic direction. Whilst this has brought some profound benefits to the establishment of GK there is a risk that at this juncture, current structures and ways of working may inhibit wider engagement, ownership, challenge and experimentation.

5. There is compelling evidence from stakeholders of ardent support for GK's mission and approach. However, there are observable discourses and behaviours of 'them' and 'us' rather than 'we'.

6. Stakeholders agree in principle that collaboration is important to support changing outcomes for people with multiple and complex needs. However, there is also broad acknowledgement of challenges and risks to achieving collaboration brought by the competitive environment that stakeholders operate within. There is potential for much greater shared understanding of these challenges and indeed shared opportunity for creating lasting change through explicit exploration of these risks.

7. A System Change Group has been successfully established with a sample of representatives from GK Partner organisations. Members of the System Change group have maintained enthusiasm but struggled initially to understand their purpose and the nature of their activities. Levels of communication, trust, and challenge have developed over time within the group. The initiation of the Action Learning Set has also provided additional opportunities to share knowledge and expertise, and air issues of competition and potential conflicts of interest.

8. There has been significant learning around the Programme Team's work with the System Change Group to refine approaches to working with 'blocks and barriers' data to understand and initiate systems change. At present ownership largely lies with the GK Programme and Service Co-ordinator team rather than with the broader collective or the System Change Group. The process is time consuming and whilst it facilitates some important discussion about key aspects of system change, the approach risks disconnect from the bigger picture.

9. Members of the System Change Group are keen to see collective practices challenged and to see learning shared with the Board, whilst there is also frustration with blocks and barriers perceived as beyond their power to change. The System Change Group has moved beyond forming to 'norming'. To date, the focus has been largely around understanding issues and sharing information which has been less focused on taking action. It is perhaps too early to expect evidence of directly instigated changes that improve client experience or ways of working.

10. Development of data sharing and strategic use of data intelligence is in its infancy both in terms of shaping and galvanising partnership working for GK and indeed for the wider City.

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Learning questions - The Golden Key partnership & ways of working

1. Who owns Golden Key, how is this ownership enacted, and how are different forms of ownership related to behaviours and outcomes?

2. What is the nature of the power and inequality of stakeholders? Do all partners have an equal opportunity to engage? In what specific areas are stakeholders competing? How does competition manifest into behaviours and what are the effects of this?

3. What role(s) do those with lived experience play in shaping the relationship between commissioning and service provision? Can or should this involvement be leveraged further to disrupt current practices?

4. What kind(s) of leadership might be needed to take Golden Key into a new phase of collective ownership and delivery? How can shared territory and common cause be identified?

5. What are the opportunities within the partnership to gain insight and other strategic benefits through data collection, sharing, and analysis? How might this benefit partners, clients and other stakeholders? How can this activity be approached collectively?

6. What does disruptive change look and feel like? How and what can Golden Key learn from theories of systems change and other people's experiences of achieving systems change?

7. What are the potential outcomes when activities are innovative, creative, and disruptive? What would success look like and how can this be attributed to Golden Key and its partners?

5 Citywide engagement and systems change

In this chapter we consider the third level of our evaluation framework – the extent to which GK is engaging with stakeholders across the city and facilitating systems change in the provision of services to people with multiple complex needs.

5.1 Strategic engagement and Golden Key Champions

Much of the work for the original bid to Big Lottery involved reaching out to key stakeholders across the City and the impact of this was evidenced in the GK launch event in November 2014 reflecting a real sense of City wide engagement, hope for change and energy.

The City Mayor's visible support and vocalisation of the need to address inequality and issues of homelessness gave the signal that GK was of strategic importance to the City. It is notable that political leadership is absent from the Board table though it may be that formal representation is considered inappropriate. Certainly current discussions led by the Chair John Simpson, with the Mayor and Bristol City Council key stakeholders around the potential for synergy with the City of Learning initiative focusing on city wide challenges represents a timely highly positive and strategic development.

The Business Plan identified additional prominent leaders and champions committed to GK, including: George Ferguson (Bristol City Mayor), Sue Mountstevens (Police and Crime Commissioner), John Savage (leading businessman), and Janet Maxwell (former Bristol Director of Public Health). Whilst the police force are represented on the Board it is not clear to what degree the connection is being actively made with the Police and Crime Commissioner, and likewise in relation to the role of Business in the Community and leading business champion of social change John Savage. Regarding the public health champion, Janet Maxwell is no longer in post and it will therefore be crucial for GK to foster a strategic relationship with the new Director if not already in train. Our recent national evaluation[10] of systems change in public service transformation demonstrates in particular the strategic value of public health and the crucial role that Public Health Directors can play in bringing multiple perspectives together.

The original business plan built on the concept of broadening the role of champions to a wider community as a means to address stigma and prejudice. At this relatively early juncture of GK's journey, this ambition perhaps unsurprisingly does not appear to feature in the mind set of many stakeholders. This evaluation offers a potentially useful point and space to consider how GK might want to take forward its work with the City champions, exploring how each might help the other's and City wide agenda? It may be useful to consider the kinds of influence community champions might bring, and what might the impact be for the City? And further to consider

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[10] http://www.localleadership.gov.uk/place/localvison/

what kinds of leadership, steps and timescales will be needed to make real the concept of a wider community based championing of the GK cause?

Certainly our knowledge of effective place-based leadership in cities across the globe demonstrates the necessity to lead across multiple spheres (socio cultural, economic, governmental and political) in catalysing for disruptive change, as illustrated in Figure 3.
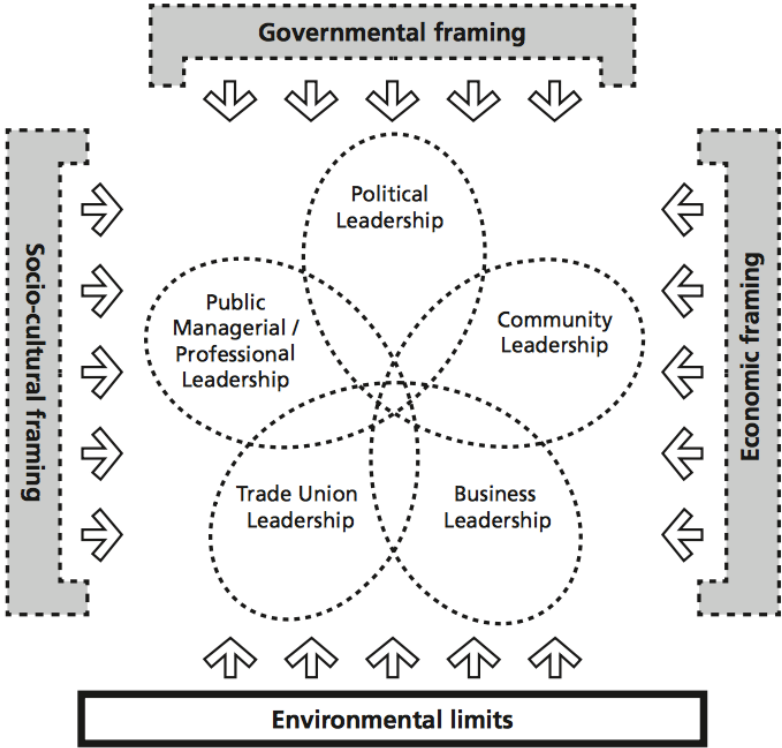
Figure 3 - Place-based leadership in context[11]

Golden Key could usefully draw on the work of leadership as social movement here, such as Marshall Ganz[12] of Massachusetts Institute of Technology (MIT) or indeed network leadership and complexity[13] and consider what role social and psychological capital might play in taking idea this forward, and the part technology and social media could play in this process. Indeed this is a whole area of expertise that may currently lie outside of GK where it may be beneficial for GK to lead an enquiry to inform development of its change strategy. Current engagement with the Schumacher Institute signals positive recognition of the need for further understanding and skills sets in this area.

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[11] Hambleton, R. (2015). *Leading the Inclusive City: Place-based innovation for a bounded planet.* Bristol: The Policy Press. Page. 128.

[12] http://video.mit.edu/watch/distributed-leadership-in-the-obama-campaign-9460/

[13] See, for example https://complexityandmanagement.wordpress.com

5.2 Challenges of the City wide context: austerity and competition

Across the City and for GK the impact of the wider national policy context and austerity agenda cannot be ignored. Cuts to benefits and the knock on effects on plans for social housing for example form the basis of current news headlines[14]. Significantly, this agenda surfaced in discussions at the most recent Board meeting in the first opportunity given for round table discussions of the impact of policy at local level. As one partner observed "*we are beginning to see the collective picture in working around the table*". Other key policy such as "The Bedroom tax" was also mentioned as significant in shaping and impacting negatively on the ability to meet social housing need alongside current strong evidence[15] that the numbers of rough sleepers are increasing which in turn is raising demand for services. The potential for GK to play a City wide and highly strategic role in articulating the inter-related state of need for our most vulnerable citizens and to demonstrate the economic implications of the cost of this for collective services, community and those left unsupported by services. The GK Board represents a place for powerful potential leadership to galvanise fundamental change across the wider City during an era of unprecedented assault on the nature and value of public services.

5.3 Strategic potential of data intelligence in Golden Key

The potential value of sharing data intelligence has been raised by the Partnership Board as members begin to recognise the possible power of collective voice around the table. Joining data, creating strong intelligence and understanding of the interconnected impact of policy on increased demand for services could help inform GK and the wider City strategy in addressing fundamental inadvertent systemic inequality in citizens' access to services. This level of work would help identify broad important patterns, since the nature of complex client problems such as mental health, addiction, homelessness and so on are usually inextricably linked. For example current rises in demands for mental health services are unlikely to decline. The impact of rising mental distress shapes substance misuse, homelessness and so in which in turn impacts on emergency services, policing, and so on. Put more simply, there is scope for GK to articulate the systemic nature of the problems faced by clients through data.

We encourage the discussions and recognition of this significant agenda by the Partnership Board and suggest that the voice of GK and an ability to shape and influence other related key strategies in the City will be further strengthened by capitalizing on the multi-agency perspectives around the table. For example a huge rise in mental health problems including suicide is creating unprecedented demands

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[14] http://www.bbc.co.uk/news/uk-35583415

[15] http://www.bbc.co.uk/news/uk-31108799

for services which most mental health trusts as the underfunded "Cinderella" of the NHS are unable to service[16].

The connection between poor housing, mental ill health and premature death is now well documented[17]. Joining up data across different services will provide powerful insight into the factors driving demand and how these might impact in accumulated fashion by definition on people with complex and multiple needs. Three useful reports that demonstrate the value of a multiple systemic approach to use of data to underpin strategy for change for our most vulnerable citizens and indeed to proactively manage 'demand' for services include the DEMOS report "Coping with the Cuts"[18], the RSA report "Managing Demand: Building Future Public Services"[19] and a very recent publication from the RSA "Getting the message on mental health"[20]. The second two reports argue that the financial case from the data used is strong enough for local authorities to prioritise strategic - rather than piecemeal - demand management to cope with the austerity agenda.

The potential scope to work with and influence key stakeholders such as service commissioners, the Joint Service Needs Assessment (JSNA), Health and Well Being Boards, the economic plans of the City through the Local Enterprise Partnership (LEP), and the systems thinking of the Health Integration Teams is obvious and will no doubt be a mark of GK's strategic impact over time. As one partner strikingly put it *"no one holds this space in the City".*

5.4 Translating Golden Key into partner agency organisations

A number of statutory stakeholders at Board level observed that whilst they saw the goals of GK as desirable, almost noble aspirations, they struggle with the translation of GK into their own institutions, which are severely squeezed by the austerity agenda. Many interviewees referred to the current environment as a challenge to achieving systems change. Most commonly, people mentioned the continuous re-structuring and changing priorities that affected the time and resources available for other projects, particularly external projects with longer-term impacts. One senior stakeholder described the situation in their organisation as follows:

> *"Moving forward with the actual organisational change is going to be the major challenge – for all the agencies, but particularly as there's so much*

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[16] http://www.bbc.co.uk/news/health-35565216

[17] For example (e.g. https://www.thersa.org/discover/publications-and-articles/rsa-blogs/2015/11/closing-the-gap/)

[18] http://www.demos.co.uk/files/Coping_-_web.pdf?1315593443

[19] https://www.thersa.org/discover/publications-and-articles/reports/managing-demand-building-future-public-services/

[20] https://www.thersa.org/discover/publications-and-articles/reports/getting-the-message-on-mental-health/

reorganisation/ streamlining going on ... which is going to make directing change at a Bristol level difficult"

All referred to the context of constant waves of restructuring, downsizing, further cuts coming, organisational constraints and the difficulty of attending to what is perceived by many as "a new project" when attention has to be focused on managing this change and uncertainty in the sector. This perspective is revealing since it suggests many GK stakeholders do not see GK as central to their own institutional agenda. Indeed it was notable that a number of stakeholders continue to refer to GK as something shaped and led by others. For example:

"Unlocking services... enabling innovation... I think that's what they want to do but again – I think we need to be realistic about the fact that with different agencies and the changes going on and the pressures, being innovative in that way isn't always possible."

"I think it's very difficult because people might say "don't do this, don't do that". But we're working according to our own guidance, and we don't have lots of power to change those things. We've got set boundaries about what we've got to do, and to what we can do."

Others were aware of the irony of being too busy and feeling 'bombarded' with pressures within their own services to inculcate GK into their own organisation even though they see that ultimately GK could help to alleviate some of those pressures.

Some partners commented on the impact of short term commissioning in contributing to the difficulties of GK achieving change in an unstable environment though perhaps GKs engagement with the commissioners offers possibilities of changing these processes over time:

"I think it's really difficult to create lasting change though, ... it's all being privatized or on voluntary sector short commissions, so there's no consistency and if you don't have that – with longer contracts – then it's going to be very difficult to work things out and change things in the long term because next year the contract holder might be different, and it'll be the same block or a different block and a completely different organisation. It's part of the world we live in now, but it is an issue."

The busyness and perception of GK as 'another project' rather than a potential solution to collective challenge faced by all agencies has meant that various GK teams have at times struggled to engage statutory services.

Certainly some stakeholders at the Systems Change (formerly the Operations) Group feel that the reality of the wider City and UK environment is not yet recognised and vocalised so that the real motivations and concerns in attending and participating are not fully voiced:

"Some differences are noticeable in that the group is diverse in terms of statutory, private (probation) but it's dominated by voluntary sector and of

course the issue is that they need commissioning to keep going…And there's been some discomfort about willingness to share things as it might affect their commissioning. I've definitely felt that strongly, even though we're certainly not there for commissioning reasons. Perhaps not so much now, but certainly at the beginning."

The danger in the current climate perhaps is that as providers feel the pressure, the response is institutional retreat, and entrenchment rather than fresh thinking, strategic level engagement to identify collective wins in recognition of shared agenda and responding institutional and collective action.[21]

Yet across the City, the imperative for systemic strategic leadership from GK is evident with increased need for services (among others, mental health, housing, accident and emergency) reported. This pattern is mirrored in analyses of rising demand for services at national level, as the most vulnerable in society feel the impact of policies that are designed to remove state support[22].

5.5 Building partnership through relational leadership

However, we also know from our studies of effective systems leadership that the real work of building trust and relationships as the basis of impetus for taking risk in creating disruptive change often happen outside of the formal meetings. Whilst this was very evident in the development of the GK bid, the degree of background relational building is less obvious since inception. Key stakeholders recognise the significance of relationship building as voiced at meetings in the informal space afforded. Indeed GK has held a number of open events to explore fundamental agenda items such as systems leadership. However there has been limited evidence of any deliberate space created until now for the building of relationships in which differences are acknowledged, values explored and motivations for being on board are fully recognised.

It is this 'soft' work of facilitated shared recognition and understanding that is in our knowledge essential to the business of systems leadership. It is interesting to note that the evaluative reflections of the action learning set (ALS) instigated on behalf of the System Change Group, whilst poorly attended (due to pressures), has provided significant relational and system perspective gains for GK and those who have attended through its focus on reflective learning, active listening and collective problem solving. These reflections also hint at the importance of a distributed understanding of leadership in which all actors can (when encouraged) both see and shape the bigger picture from wherever they are within the system. It is sometimes difficult to see the obvious when within an evolving system and in particular when

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[21] Chaskalson, M. 2012, The Mindful Workplace and De Groot, S. 2016. Responsive Leadership in Social Services

[22] Dorling, D. 2015. Inequality and the One Percent

individual organizations are under huge stress with reduced budgets and increased demands for new kinds of services as outlined earlier.

Certainly the role of the GK Chair and Programme Team are crucial as catalysts and current exploratory discussions with Bristol City Council, The Mayor and the Schumacher Institute reflect an important positive development in understanding of the leadership task. Identification of 'leverage points' across the GK system are planned which suggests that GK is constructively moving towards a more explicit understanding of a theory of change for its complex leadership task. This bodes well for the opportunity to develop a space for the development of collective leadership skills, values and behaviours, as well as building a community of people committed to the principles of shared and inclusive leadership across social and organisational boundaries.

Perhaps the golden opportunity that GK now has is the collective, yet unvoiced set of values and passion that everyone who works with our most vulnerable citizens holds, since few if any work in this sector for wages or profit alone! As one key stakeholder said "*I've been waiting for this my entire career!"*. There is an obvious opportunity to explore, identify and build upon shared values to catalyse change in taking forward the partnership Compact which will underpin the work of GK in moving forward. This ground work, in our experience, is likely to be crucial to future success since if facilitated carefully it should help to build trust and mutual understanding which is the basis of all human collaboration. What support might GK need to help in taking this kind of process forward? And where might GK look to learn from?

5.6 Key learning points and discussion questions

5.6.1 Key learning points

1. Much of the work for the original bid to Big Lottery involved reaching out to key stakeholders across the City and the impact of this was evidenced in the GK launch event in November 2014 reflecting wide engagement, hope and energy for change. Since then, the Board and GK Programme Team have put great effort into establishing modes and mechanisms to translate aspirations into action.

2. The original plans included engagement of strategic champions across the spheres of business, political, health and policing. Until now the nature, strength or strategy of this engagement has not been clear and it is timely that the Chair of GK is currently in discussions with Bristol City Council, the Mayor and other key stakeholders to take forward this agenda. Our expert research shows that leading across key strategic spheres is crucial for catalysing change.

3. The impact of City wide engagement is reflected in the range of stakeholders around the table of the Partnership Board though there is scope for addressing gaps in relation to skills and range of perspectives (currently under review) and ensuring routes for political engagement.

4. The market place reality of competition and reducing government resource for public services means that GK partners are straddling the uncomfortable tensions between wanting to collaborate for positive change whilst having to be mindful of painful organizational financial realities.

5. The respective and differing roles and perspectives of stakeholders within GK and across the City also matters. For example within the current GK picture the role of commissioners is pivotal since they hold the purse strings, and determine requirements for delivery and accountability.

6. Across the City and for GK the impact of the wider national policy context and austerity agenda cannot be ignored. This agenda is beginning to be surfaced by the Board. There is significant scope for partners to use pooled data intelligence to mobilise collective understanding of the interconnected nature of factors shaping vulnerable citizens life experience to influence City wide thinking that moves beyond siloed services. This could form the route and basis for working with key influencing forums across the City such as the JSNA, Health and Wellbeing Boards, Local Economic Partnership, Health Integration Teams and so on.

7. Many stakeholders are passionate about the goals of GK but struggle with the translation of GK into their own institutions, which are severely squeezed by the austerity agenda. The danger in the current climate is that as providers feel the pressure, the response is institutional entrenchment rather than fresh thinking, to identify collective wins. Yet across the City the imperative for systemic strategic leadership from GK is evident. A key systems leadership role for GK may be to voice and galvanise a collective systemic understanding of the 'burning platform' of social inequality and the economic and social price of this facing the City and its impact upon GK partner services at time of reducing expenditure.

8. Current engagement with an external facilitator to identify 'leverage points' across the GK system signals positive recognition of the need for further understanding and skills sets in systems leadership which suggests that GK is moving towards a more explicit understanding of a theory of change to support its complex leadership task.

9. Perhaps the golden opportunity that GK now has is the collective, yet unvoiced set of values and passion that everyone who works with our most vulnerable citizens holds. There is an obvious opportunity to identify and build upon shared values to catalyse change in taking forward the partnership Compact which will underpin the work of GK. This groundwork is likely to be crucial to future success since if facilitated carefully, it should help to build trust which is the basis of all human collaboration.

Learning questions - Citywide engagement & systems change

1. What kinds of leadership and activities are necessary to make real the concept of wider community based championing of the Golden Key cause? What kind of expertise is available to help develop strategy for wider community engagement?

2. What alternative, creative and disruptive sources of learning can Golden Key draw upon to challenge and broaden thinking –locally, nationally and/or internationally? What wider social movements or systems change work can Golden Key connect with or find inspiration from?

3. How might Golden Key develop collective shared leadership skills, values and behaviours that facilitate work across institutional boundaries? How can Golden Key facilitate a shared understanding of systems leadership?

4. What are the major levers for citywide change in meeting the needs of people with multiple complex needs? How might initiatives such as the Golden Key systems change strategy and partnership compact act as catalysts for wider engagement and systems change?

5. What strategic work does the Golden Key Partnership Board need to do to harness the power of data and create shared intelligence across the city region?

6. How can the broad ambitions of Golden Key be met in context of change, restructuring and reducing funding for public and voluntary services? How can Golden Key create a lasting legacy that will endure beyond the current Big Lottery funding?

6 Conclusion and next steps

Overall this report captures a number of significant achievements throughout the first phase of GK. An infrastructure has been put in place that enables wide scale engagement from the Service Coordinator Team through to the Partnership Board. Client experience has been involved through the Independent Futures (IF) group in many aspects of the work and a broad network of stakeholders from across the city have been engaged.

GK has so far completed three rounds of client referral and recruitment and is working with a total of 71 clients (as at Feb 2016), each of whom meets the GK definition of multiple complex needs, and many of whom had limited or challenging engagement with services previously. Whilst this phase of the evaluation does not focus on client outcomes, there are promising indications of success, including a high level of client retention and engagement, and identification and resolution of numerous blocks and barriers to success.

The real ambition of GK however lies in reviewing and challenging the ways in which services for people with multiple complex needs are configured, delivered and supported throughout Bristol, and in initiating system-wide change where required. This is a challenging objective, not least because many of the partners are firmly established within the existing system and may have vested interests in aspects of the status quo. Despite this, GK appears to be succeeding in bringing partners together, facilitating discussion and debate and promoting an aspiration for collaboration to help improve client experience and outcomes. Whilst this is no mean achievement, unsurprisingly there is still quite some way to go and the next phase of GK will need to build on the successes so far in order to establish an enduring legacy. The Partnership Board, System Change Group and Programme Team are already giving this consideration and the emerging Systems Change Strategy, Blocks and Barriers process, GK Compact and PIE strategy all have the potential to become significant levers for systems change.

Such a large and complex initiative poses real challenges for leadership and management, including the development of a genuine sense of mutual responsibility, accountability, trust, ownership and recognition, whilst also ensuring that appropriate governance processes and safeguards are in place. The Programme Team at Second Step, as well as those leading the various GK sub-groups, have invested their time, energy and commitment in getting GK up and running throughout what has been a busy and challenging time for all. As we move into the next phase of activity, however, we would expect to see people in an increasingly broad set of roles, groups and organisations developing an active sense of ownership and responsibility, collectively shaping the future of GK.

The next phase of the evaluation will include working with quantitative indicators to support the economic and social return on investment analysis, as well as engaging peer researchers to help document and explore the experiences of Golden Key clients. We will also be working more actively on the evaluation of

Psychologically Informed Environment (PIE) and the development of the innovation pilot activities.

Should you wish to contact a member of the Golden Key local evaluation team to discuss any aspect of this report, the evaluation process and/or your experience of Golden Key please do not hesitate to get in touch with one of us: Anita.Gulati@uwe.ac.uk; Richard.Bolden@uwe.ac.uk; Beth.Isaac@uwe.ac.uk.

7 Appendix 1 – Evaluation framework

GK is a values-led project that focuses on client experience and engagement with service providers. The evaluation mirrors this client-centred philosophy - putting lived experience at the heart of our enquiry. Our approach is informed by principles of action research and appreciative inquiry, which encourage a balance between objectivity and engagement in our role as evaluators, and the provision of formative, summative and transformative learning and insights. Our approach, whilst rigorous and evidence-based, seeks to be compassionate and responsive to changing needs and contexts – focussing on what can be learnt rather than impact alone.

Central to the GK approach are the principles of 'Psychologically Informed Environments' (PIE) and 'systems change', which together offer a robust framework for linking individual and systemic perspectives. A distinctive feature of PIE within the GK context is an understanding of how underlying psychological factors and previous experience impact upon user engagement with services. Key elements of PIE include building relationships, trust, attachment and social support in order to enhance an individual's sense of resilience and agency. The concept of 'system change' suggests that organisations are complex, open systems with self-organising properties, distributed control and in which change is emergent and non-linear. Taking a systems approach highlights the mechanisms through which some interventions can have a large impact whilst others may have little effect. In bringing together PIE and systems change the evaluation aims to identify how individual, group, organisational and distributed processes and practices influence the provision and experience of services in context and over time.

As evaluators we need to retain a degree of critical distance from programme design and implementation such that we are able to impartially assess the nature and impacts of the GK project. All programmes are based on some underlying 'theory of change' and a key part of our role as evaluators is to surface and test the GK 'theory' and its assumptions. From initial analysis we can identify three primary pathways to impact within GK:

- Improving client outcomes
- Developing a supportive, responsive and coordinated system
- Contributing towards and enabling city wide institutional change.

Causal pathways at each of these three levels will be explored and analysed throughout the evaluation, with particular focus on:

- The systemic resources and constraints that GK clients and staff encounter.
- Processes of learning, adaptation and refocussing that occur.
- The role and importance of PIE approaches.
- The role and importance of user inputs and experiences.

For each of these transformations there are measures that can be monitored over time in order to understand whether and how particular outcomes are

accomplished. Table 1 provides an indicative illustration of change pathways that will be explored and elaborated throughout the evaluation.
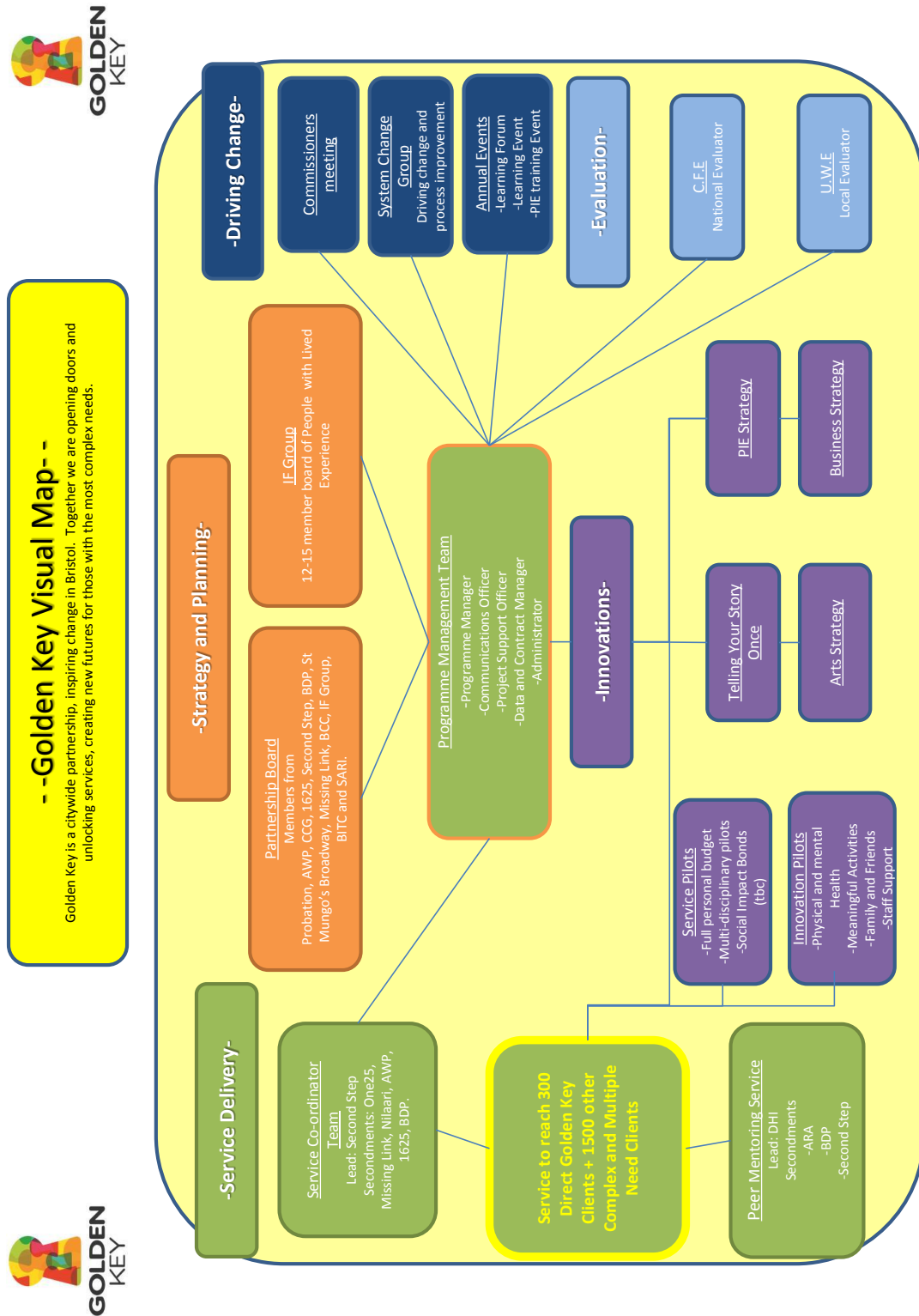
Whilst, for ease of representation, these pathways are shown as distinct and linear, in practice these factors are complex and interconnected. As GK develops, a more detailed 'model' will emerge that will show interconnections across the key themes and elements. As implementation develops we can also anticipate radical changes in direction and the evaluation will consider what experiences/lessons can be learnt.

Pathway	Behaviours	Processes	Outcomes	Impacts
Client experience & wellbeing	• New staff skills • New roles e.g. peer support/IF • New forms of coordination	• Psychologically Informed Environment • Personal budgets • Telling your story website • Peer learning	• Client trust and confidence • Greater learning and sense of control • Greater capabilities • New ways of accessing services • Client involvement in planning and delivery	• Changes in life choices • More self determination • Fewer crises • Access to housing • Access to employment routes • Better physical and mental health • Access to benefits and safe income
Systems change amongst providers & key stakeholders	• Strategic manage-ment, Improved coordination Appropriate leadership • Suitable resourcing • Action learning	• New work practices • Staff development and training • Skilled and committed staff – less burnout • Multi-disciplinary teams	• New commissioning priorities • Interagency coordination • Effective staff and management cadre • More efficient and collaborative agencies • Improved understanding of needs and behaviours building on PIE	• More accessible and responsive services • Public finance costs reduced – A&E, Courts etc • New systems established & embedded • GK model disseminates & becomes the 'standard'
Citywide engagement & change	• Recruit community and business champions • Political champion/s • Strategic engagement of Board • Active peer engagement	• Stereotypes challenged • Key city stakeholders on board • Volunteer engagement	• New social & support networks • New patterns of resourcing and investment – e.g. in housing • New economic activities emerge	• City wide responsiveness to multiple/ complex needs • New assets and capabilities • Embedded cultural change • New forms of economic activity • New 'multiple needs' policies & commissioning practices in place

Table 1 – Indicative pathways to change

8 Appendix 2 – Golden Key structures and processes

8.1 Golden Key visual map

--Golden Key Visual Map- -
Golden Key is a citywide partnership, inspiring change in Bristol. Together we are opening doors and unlocking services, creating new futures for those with the most complex needs.

-Driving Change-

Commissioners meeting

System Change Group
Driving change and process improvement

Annual Events
-Learning Forum
-Learning Event
-PIE training Event

-Evaluation-

C.F.E
National Evaluator

U.W.E
Local Evaluator

-Strategy and Planning-

IF Group
12-15 member board of People with Lived Experience

Partnership Board
Members from
Probation, AWP, CCG, 1625, Second Step, BDP, St Mungo's Broadway, Missing Link, BCC, IF Group, BITC and SARI.

Programme Management Team
-Programme Manager
-Communications Officer
-Project Support Officer
-Data and Contract Manager
-Administrator

-Innovations-

PIE Strategy

Business Strategy

Telling Your Story Once

Arts Strategy

Service Pilots
-Full personal budget
-Multi-disciplinary pilots
-Social Impact Bonds (tbc)

Innovation Pilots
-Physical and mental Health
-Meaningful Activities
-Family and Friends
-Staff Support

-Service Delivery-

Service Co-ordinator Team
Lead: Second Step
Secondments: One25, Missing Link, Nilaari, AWP, 1625, BDP.

Service to reach 300 Direct Golden Key Clients + 1500 other Complex and Multiple Need Clients

Peer Mentoring Service
Lead: DHI
Secondments
-ARA
-BDP
-Second Step

The Golden Key Programme aims to progress every element in line with psychologically informed principles

GK Local Evaluation

Business strategy

Partner co-researchers

Partner interviews

Partner data on processes and impacts

Programme management team

Project team interviews

Commissioners meeting

Recording of baseline economic data

Arts strategy

Service pilots

Partnership board

Systems change and leadership

Economic and social impact

Psychologically informed environment

Service co-ordinator team

Longitudinal, systemic evaluation

CFE national evaluation

Access to data for national and independent evaluations

Innovation pilots

Participant observation at key meetings

Action learning sets

Systems change (operations) team

Service user interviews

Telling your story once

IF Group

Recording of service user data

Service user researchers

Notes

MILD WEST