

Reaching out

Golden Key Local Evaluation Phase 1 Summary Report

Bristol Leadership Centre
Bristol Business School

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**GOLDEN
KEY**



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



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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



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1. Introduction

This report summarises the findings from Phase 1 of the local evaluation of Golden Key through the first 18 months of initial development, progress towards delivery and operational services delivery from Autumn 2014 to Spring 2016.

About Golden Key

Bristol Golden Key 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.

The lead agency is Second Step, who hold contractual responsibility for the project. Strategic direction and guidance is provided by the Golden Key Partnership Board, which includes senior-level representatives from Avon & Somerset Police; Avon & Wiltshire Mental Health Partnership Trust; Big Lottery Fund; Bristol City Council; Bristol Drugs Project; Bristol Clinical Commissioning Group; Bristol, Gloucestershire, Somerset & Wiltshire Community Rehabilitation Company; Business in the Community; Missing Link; National Offender Management Service; 16-25 Independent People; Second Step; St Mungo's; Stand against Racism and Inequality (attending annually); as well as citizens with experience from the Independent Futures (IF) Group.

Golden Key has a number of ambitious aims, including:

- 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 furthest 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.



About this evaluation

Bristol Leadership Centre at the University of the West of England was commissioned in autumn 2014 to act as local evaluation partner for this initiative. 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 to support and catalyse further learning and change 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 Golden Key initiative. The evaluation contributes to Golden Key in a number of ways, including:

- Identifying programme outcomes
- Exploring mechanisms for change
- Investigating social value and local economic impact
- Exploring the role of psychologically informed working practices
- Identifying lessons from pilot activity
- 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 impacts over time.

The analysis is framed by the evaluation framework, developed in collaboration with Golden Key partners, which describes and analyses Golden Key's progress across three key pathways to change.

3 pathways to change

- 1 **Client's life experience** and wellbeing develop positively.
- 2 **Systems change amongst partners** towards developing supportive and coordinated systems that are responsive to people with multiple and complex needs.
- 3 **Citywide systems change** towards developing Bristol 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 Golden Key to develop and transform over time and our evaluation framework will be reviewed regularly to reflect this. So far the local evaluation team have collected and analysed qualitative data through interviews with around 40 key stakeholders, participant observation at over 25 key meetings and events, and analysis of programme communication/ documentation. This report presents a summary of these findings; a more detailed full report is available on request.

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>

The report is structured into three main sections: (1) client engagement, (2) Golden Key partnership and ways of working, and (3) citywide engagement and systems change.

For each section, you will find a set of 'learning questions' that have been identified to support reflection and discussion by Golden Key stakeholders. Given the relatively early stage in the initiative, much of the content of this report is a retrospective review of stakeholder experiences. This approach will be elaborated through a wider range of qualitative and quantitative analyses in subsequent phases of the evaluation, once additional data becomes available.



2. Client engagement

Establishing the Service Coordinator Team

A core element of Golden Key's approach is a lead Service Coordinator Team who *'walk alongside'* people with multiple and complex needs ('clients'), to support their journey through navigating services, advocating and mentoring. This team is managed by Second Step and was set-up through a phased process of recruitment that began in November 2014. The team now consists of 11 Service Coordinators, a team manager and deputy manager.

Golden Key partner organisations are responsible for seven seconded Service Coordinators who hold specific client group expertise related to each of their seconding agencies (e.g. women, young people, BME, mental health, etc.). Service Coordinators 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 resources and requirements.

The degree to which Service Coordinators remain embedded within their seconding organisation appears to be variable, partly due to recruitment processes but also due to differences in the Golden Key partner organisations themselves. Several stakeholders suggested there was potential for Service Coordinators to share their expertise and good practice more widely beyond their team.

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 which involved working in challenging circumstances whilst new processes, systems, and protocols were developed. The

space allowed for the emergent nature of these roles may at times have caused challenges for some Service Coordinators and demonstrates the difficult reality of learning in action.

“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.”

Golden Key Service Coordinator

How are Service Coordinators working with clients?

During this first phase, we considered it was too early to assess the impact of this work on client outcomes. However, emerging case evidence suggests that their approach is having a positive impact, with a good proportion of Golden Key clients remaining engaged and experiencing improved access to services. The next phase of the evaluation focuses on tracking the client journey and further incorporates the voice of the service user in co-researcher evaluation activities.

Not all selected clients have remained engaged, however, as might be expected with the nature of client's lives and trajectories. There are also a number of clients who are deemed eligible but were not accepted during a particular 'referral window'. There is scope for further learning from the process of referral and selection in this area.

Many stakeholders reiterate the metaphor to describe Service Coordinator's role as '*walking alongside*' clients. Yet our research indicates this does not fully capture the extent of Service Coordinator activity which, true to a client focused approach, often takes a more active form of support and stability for clients. 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 other agencies that should be doing things for them. There isn't one other agency in Bristol that should be doing all those things...”

Golden Key Service Coordinator

There are important implications for all stakeholders if the service provision elements of Service Coordinator activities are not fully understood. Some questions, for example, have been asked about the sustainability of the Service Coordinator Team beyond the current BIG Lottery funding and the potential benefit of closer integration with existing partner activities.



Finding Golden Key clients: referral and selection processes

Client recruitment has taken place in three distinct phases between Autumn 2014 to Spring 2016, with 71 clients accepted from the first two phases, of which 56 have been engaged. The Service Coordinator Team are currently in the process of engaging with the third phase cohort. Developing the referral and selection processes has involved considerable work and there is clear evidence of a healthy approach to learning in how the processes have adapted over time. Time establishing and refining new processes has been a necessary investment, defining assessment tools, policies, and protocols, involving expert input from key figures in specialist service provider agencies as well as the Independent Futures (IF) Group.

Some variation in partner's views of referral processes was noted through evaluation interviews. Some found the seconded Service Coordinator arrangement positive in terms of referrals. Other interviewees (particularly those with no Service Coordinator secondment) have reported a degree of confusion, lack of awareness, and occasional frustration about eligibility criteria and the relatively short referral windows.

“It’s frustrating for my workers to wait for [Golden Key] referral windows to open.... They’re not looking at Golden Key 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 Golden Key to get extra support and input?’”

Golden Key Partner Organisation

A particular challenge was also raised of how those referring could provide sufficient client information whilst ensuring the anonymity that Golden Key confidentiality protocols require.



Determining who gets the 'golden key'

Stakeholders we spoke with broadly understood Golden Key's vision of the target client group as those *'stuck in a revolving door cycle'* who repeatedly access services without changing their outcome. However, stakeholders had various and conflicting interpretations of other characterisations of the target population, such as those who were *'furthest away from (accessing) services'* and *'hidden'*. Several challenges arose in relation to this from our stakeholder research with important questions to consider for future client referral and selection:

- Firstly that all existing Golden Key clients (as at Autumn 2015) had been referred from service providers and the amount of information required for the referrals process meant that the individual would be relatively well known to at least some service providers.
- Secondly, the thresholds for selection across multiple 'needs' are understood as being at such a level to make it unlikely that such potential clients would be entirely 'hidden' from, or not accessing any services.
- Thirdly, some stakeholders have indicated there may be a relationship between engagement of local black and minority ethnic (BME) groups and those *'furthest away from (accessing) services'* or *'hidden'*.

With more demand for Golden Key's services than resources can meet, client recruitment inevitably has a 'gatekeeper' role with client selection criteria being critical. Whilst Golden Key has set out to target particular demographic client groups with a clear rationale of client need, there may be fresh challenging questions arising in terms of equal opportunities and the most effective way of allocating the limited resources of Golden Key given the programme's scope and long term perspective. Whatever decisions are made regarding recruitment, 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.

There is a rich and valuable store of knowledge and expertise within the Golden Key partnership and at national level that has informed the rationale behind defining the target population and client selection decisions. Our research suggests that there is scope to make further use of local and national data analytics, alongside the equal opportunities policy, to define and understand the nature of Bristol's specific population of people with multiple complex needs. Insights from data analysis can help shape and test the rationale for client selection to catalyse learning. Validating and sharing a clear evidence base that supports client selection decisions would be highly beneficial to the partnership's learning for Golden Key and beyond.



The voice of experienced service users

One of the specific features of the Golden Key approach is *'supporting a sustainable, authentic client voice through the Independent Futures (IF) Group'* (Golden Key Compact, 5.1). Evidence from this first phase suggests that the IF group¹ is functioning well and that, overall, members are pleased with their level of engagement with key stakeholders.

“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.”

IF Group Member

Several initial IF group members were involved with Golden Key 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 Year 1, IF Group members have contributed to the client pathway in a variety of ways, including: identifying and interviewing clients in the referral process; employee recruitment and commissioning input, commenting on operational issues and processes through the Systems Change Group, Partnership Board and other Golden Key forums; supporting development of the peer mentoring service; engaging with the national evaluation through participation in the 'National Expert Citizens Group' coordinated by CFE.

¹ <http://ifgroup.org.uk>

As Golden Key has evolved, so too has the IF group's collective sense of purpose and the nature of their engagement with stakeholders. IF group members report that they feel they now play a range of important roles within Golden Key, including that of 'critical friend', ensuring that Golden Key is aware of when it may fall short in its approach to delivery and '*personalising or humanising*' discussions around client experience.

“ *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.* ”

IF Group Member

The determination shown by IF Group members to engage actively and make a positive contribution to Golden Key is notable, despite struggles with the realities of changing membership, a diverse set of expectations and backgrounds and indeed on-going complex challenges in their own lives.

Whilst the IF Group are represented on all major Golden Key activities, given the significance of the 'user-led' voice in helping to understand the barriers facing potential clients and in helping to shape the trajectory of Golden Key, our evaluation surfaces a question in relation to whether the current structures and processes offer the most effective route for facilitating learning and opportunity for system change from the service user perspective, and how the role of the IF group in relation to Golden Key may develop in the future. The evaluation team are currently conducting further in-depth interviews with IF Group members to understand the experiences of this group and how this can inform subsequent work in evaluating the client experience.

Psychologically Informed Environments

Developing organisations operating in line with Psychologically Informed Environment (PIE) practices is a core part of Golden Key's strategy for improving the client experience in Partner organisations. Whilst there is emerging evidence that the practice and physical environments of many Golden Key partners are already psychologically informed our interviews showed considerable variation across different stakeholders at different levels in understanding what PIE means. The Golden Key psychologist has developed PIE training for 3 different groups (2 & 4 day courses for frontline support staff, plus a 1 day course for non-support roles) and so far delivered training to around 90 individuals.

A Golden Key PIE 'working' Group of psychologists and service providers has been established and meets regularly to support collaborative progression in this area. A PIE 'audit' tool has been developed by the local evaluation team in collaboration with the IF group and Golden Key PIE group and is currently being trialled with several Golden Key partners as it is now a priority to record baseline activity within the partnership. Future evaluation reporting will incorporate data from this tool to benchmark the current picture and to track development.

Peer mentoring service and innovation pilots

In addition to the elements outlined already, the Golden Key delivery plan identifies a number of other activities and 'innovation pilots' to test the efficacy of different approaches to client engagement. Whilst many of these are still in their early stages, some progress has been made in terms of scoping and initiating activity.

Three key initiatives, which will be explored in later phases of the evaluation, are summarised below.

1. Peer mentoring: The vision of a 'peer mentor' is to provide a positive role model who brings lived experience to support clients. The charity Developing Health and Independence (DHI) successfully won the contract for the peer mentoring service in July 2015. A celebratory launch event for the service in January 2016 provided a networking opportunity for Golden Key stakeholders and collaborative workshop sessions gaining input to challenges in developing the peer mentoring service (e.g. recruiting and retaining peer mentors, skills development, matching peer mentors with clients).

2. Tell Your Story Once: This innovation intends to resolve service user's frustrations with repeated assessments with multiple agencies that presents a barrier to client's engagement with services. Several technical solutions have been explored by the partnership, the most popular model currently being a secured online portal where clients, family and friends can upload their stories in different formats. Details are some way from being finalised and before a solution is commissioned.

3. Personal budgets: Golden Key plans to develop a pilot of full personal budgets for clients in recognition that they often have limited money for items and services that can make a real difference. Currently Golden Key clients access a small personal budget of £500 for their first three years of involvement, administered by their lead Service Coordinator. These experiences with small budgets are being monitored to feed shortly into the development and scoping of the future planned full personal budgets innovation pilot.

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?

3. Golden Key partnership & ways of working

Establishing the Golden Key partnership

Second Step and Golden Key partners have invested significant organisational and personal resources in the design and development of the Big Lottery Fund *Fulfilling Lives* programme in Bristol. This in itself is a significant collaborative achievement and testament to the passion and commitment of those involved.

The partnership is a consortium of organisations committed to Golden Key with representatives forming the Partnership Board, which provides strategic direction and governance. The Partnership Board includes senior-level representatives from a range of organisations involved in the funding and support of people with multiple complex needs in Bristol (see introduction), as well as client voice representatives from the IF Group.

The role of the Partnership Board is crucial in facilitating collective ownership of Golden Key and has helped to ensure strategic direction and engagement of key partners around the table. The appointment of an independent Chair in April 2015 represented a pivotal juncture for the Golden Key Partnership Board, which has brought clarity of role, increased commitment and openness to seeing afresh. The Board is increasingly taking ownership of strategy and exploring the potential for collective leadership present at the table, although a consistent, shared sense of membership is yet to develop.

Collaboration, ownership and engagement

Involvement of key partners, in particular Second Step, has had a strong influence on ways of working and strategic direction. The leadership, passion, vision, reputation, experience and determination of Second Step were crucial in establishing Golden Key. However, as Golden Key develops, changes to existing structures and ways of working may be necessary to facilitate wider engagement, ownership, challenge and experimentation.

There is compelling evidence from stakeholders of ardent support for Golden Key's mission and approach. However, there are observable discourses and behaviours of 'them' and 'us' rather than 'we' that indicate the potential to develop a deeper sense of shared ownership, engagement and collaboration.

“*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.*”

Golden Key Partner Organisation



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

“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.”

Golden Key Partner Organisation

Good progress has been made in establishing a database within Second Step that facilitates the Service Coordinator team’s collection of client experiences. However, data sharing between Golden Key partners and strategic use of data intelligence is in its infancy and is an area where further work may be required in order to initiate lasting change.



Coordinating systems change and activities across partners

Whilst the Partnership Board provides strategic direction, day-to-day operational issues and the coordination of activities across partners, are overseen by the Golden Key Programme Team (based at Second Step) and the Systems Change Group, which includes representatives from partner organisations, as well as the IF Group.

Members of the Systems Change Group have maintained enthusiasm but struggled initially to understand their purpose and the nature of their activities. Important foundations have been laid through developing levels of communication, trust, and challenge within the group over time. The initiation of the Action Learning Set has also provided additional opportunities to share knowledge and expertise, issues of competition, and potential conflicts of interest.

“ [I’ve developed] 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 or protectionist. ”

Golden Key Action Learning Set Participant

There has been significant learning around the Programme Team’s work with the System Change Group to refine approaches to working with the ‘blocks and barriers’ dataset to understand and initiate systems change. The Service Coordinator team have worked hard to generate robust data to inform systems change with over 480 system change events recorded and coded thematically. The current approach to categorising this data, however, is time consuming and whilst it facilitates some important discussion about key aspects of system change, risks disconnect from

clients, Service Coordinators, and the bigger picture. At this stage, ownership largely lies with the Golden Key Programme and Service Coordinator Team rather than with the broader collective partnership or the System Change Group.

Members of the System Change Group are keen to see working practices challenged and for learning to be shared with the Board, but there is also some frustration with blocks and barriers perceived as beyond their power to change. There is a risk, however, that a focus on ironing out difficulties in the existing system does not create enough space for encouraging fresh questioning and disruptive systems-wide change.

“*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.*”

Systems Change Group Member

A core assumption 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 Golden Key clients, who in 'walking alongside' are well placed to identify, code and record blocks and barriers as they arise in 'real time'.

This approach to identifying and addressing blocks and barriers has 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. 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 may sometimes reflect poorly on individuals or 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.

Whilst Golden Key have put in place a clear mechanism for how partners interact and work together, the evaluation reveals some tensions and potential contradictions between the ambition of promoting 'disruptive systems change' whilst continuing to operate in a somewhat siloed and hierarchical manner.

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?



4. Citywide engagement & systems change

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

The original plans included identifying strategic champions across the city to help Golden Key engage with and influence business, political, health, policing, and other spheres, although so far the extent of this engagement has remained unclear. Research shows that leading across key strategic spheres is crucial for catalysing change so it is timely that the Partnership Board's Chair is currently in discussions with Bristol City Council, the Mayor and other key stakeholders to advance this agenda.

Across the City and for Golden Key the impact of the wider national policy context and austerity agenda cannot be ignored and is beginning to be surfaced by the Partnership Board. Partners are passionate about Golden Key's goals, but some have struggled to align these with their own institutional priorities. Golden Key partners are straddling the uncomfortable tensions between a desire to collaborate for positive change whilst dealing with painful organisational financial realities in a competitive environment. The danger in the current climate is that as providers feel the pressure, their response is institutional entrenchment, rather than fresh thinking to identify collective wins. The role of commissioners is a key leverage point since they hold the purse strings, determine requirements for delivery and accountability, and potentially can influence upwards.

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 sources, creating strong intelligence and understanding of the interconnected impact of policy on increased demand for services could help inform Golden Key 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 and homelessness are 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 on, which in turn impacts on emergency services and policing. Put more simply, there is scope for Golden Key to articulate the systemic nature of the problems faced by clients through data analytics.

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 should be a mark of Golden Key's strategic impact over time. As one partner strikingly put it: *"no one holds this space in the City"*.

A number of statutory stakeholders at Board level observed that whilst they saw the goals of Golden Key as desirable, almost noble aspirations, they sometimes struggle with the translation of these 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 reorganisation/streamlining going on ... which is going to make directing change at Bristol level difficult.”

Golden Key Partner Organisation

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 stakeholders do not see Golden Key as central to their own institutional agenda. Indeed it was notable that a number of stakeholders continue to refer to Golden Key as something shaped and led by others.



However, we know from 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 happens outside of formal meetings. Whilst this was very evident in the development of the Golden Key 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 Golden Key has held a number of open events to explore key 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 instigated on behalf of the System Change Group, whilst poorly attended (due to time pressures), has provided significant relational and system perspective gains for Golden Key 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 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 Independent Chair and Golden Key Programme Team are crucial as catalysts and current exploratory discussions with Bristol City Council, The Mayor and others reflect an important positive development in understanding of

the leadership task. Identification of 'leverage points' across the Golden Key system are planned which suggests that Golden Key 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 Golden Key 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 Golden Key in moving forward. This ground work will in our experience be likely to be crucial to future success since if facilitated carefully should help to build trust and mutual understanding 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?

5. Summing up

This report captures a number of significant achievements, learning experiences and challenges throughout the initiation phase of Golden Key. However, the real ambition of Golden Key is in challenging the ways services for people with multiple complex needs in Bristol are configured, and in initiating system-wide change where required. This is particularly challenging as many partners are established in existing systems with vested interests in aspects of the status quo. Despite this, Golden Key has succeeded in bringing partners together, facilitating discussion and debate and promoting 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 Golden Key now needs to build on the successes so far in order to establish an enduring legacy. The emerging Systems Change Strategy, Blocks and Barriers process, Golden Key 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 Golden Key sub-groups, have invested their time, energy and commitment in getting Golden Key up and running throughout what has been a busy and challenging time for all. As Golden Key moves 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 Golden Key.

6. Next steps for the evaluation

To catalyse learning from this stage of the evaluation, stakeholder workshops are planned to create spaces where others can engage with these questions and generate further shared learning for the partnership. We anticipate the workshop experiences will also subsequently feed into the next phase of the evaluation.

Next phase evaluation activities include:

- Capturing Golden Key service user experience through client journey mapping and peer research.
- Working with quantitative indicators to explore economic and social return on investment.
- Evaluating the use of a Psychologically Informed Environment (PIE) approach.

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.

Notes

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