What Matters to You: Literature and Practice Review

Cathy Sharp, Jo Kennedy, and Donald Scott

December 2022

what matters to **you**

Contents

Introduction to this briefing

What Matters to You (WM2U) is a community-based systems change initiative working alongside families in two communities in Dundee and East Ayrshire. System change is about shifting the conditions that keep a problem in place. WM2U focuses on shifting public resources to offer support earlier, thereby enabling children to flourish within their own families. This is built on an underlying aspiration that by listening to the voices of children and families to inform investment in prevention, fewer children will need to be looked after and that local authorities will be able to redesign services and shift some of their investment from more expensive care provision to early intervention approaches.

The purpose of this briefing is to inform the WM2U Programme Board, the Oversight and Enabling Boards in each local authority, and other stakeholders of allied developments amongst those looking to achieve system change in policy and community contexts similar to those of WM2U.

In the review, we provide a brief synopsis of initiatives or reports that are of most relevance or have been highlighted recently as being of likely interest. This has been supplemented by several accounts of practice provided directly to the learning partner team or drawn from their own wider work. Not a comprehensive review of recent published or grey literature or practice, this review seeks to position the work of WM2U in a broader context.

It should help the Board and partners to understand the wider environment and potential challenges and provide a larger perspective when considering the ambition and progress of WM2U. Our focus here is to illuminate learning about how the work of system change might proceed, rather than on an analysis of the complex issues it is designed to tackle or the desire to see it.

To stay connected and contribute to our developing thinking and practice, please contact Jackie Brock, WM2U Programme Manager, jackie@whatmatters2u.org.uk

Summary of Key Points

Approaches to system change

1. There are several system change initiatives that we are aware of with similar ambitions to WM2U. Whilst not all focus on voice-led change, starting with asking and responding to what matters to individuals is seen as a promising way to build relationships and gain trust and as a gateway to deeper and more sustainable change.

2. Shifting the focus in organisations from the day-to-day work to examine values, core purpose, the dynamics of the system and impact is crucial but difficult. This needs to explore expectations, including potential tensions about models of change and the need to tackle some issues at a corporate, rather than individual level.

3. Engaged funders and third sector organisations can play a crucial role in supporting vulnerable families and young people. Their connections and access are highly valued by local authority partners, but the intelligence they gather is rarely used to support organisational learning or system change.

4. Poverty is a significant barrier to system change when services fail to take account of it and compromises attempts to meet people early in their problems. The views of those living in poverty should be part of the development, implementation and evaluation of policies and actions, to ensure the understanding of it is reflected in all aspects of change processes.

Experimentation and learning

5 A 'test and learn', experimental or learning cycle approach is commonly at the heart of approaches adopted by others with an emphasis on embracing uncertainty and learning from failures as well as success. This is not in conflict with 'evidence-based practice' but recognises that we need to generate and assess evidence about whatever approaches we implement, whether based on formal evidence from elsewhere or ideas co-designed by practitioners and community members.

6 In thinking about engagement and experimentation, attention needs to be paid to who is engaged in developing system change initiatives, to the construction of cross-sector collaborations, a clear mandate for professionals to take initiatives forward as an integral part of their work, and to the participation of community members in the co-design and evaluation of 'experimental' practices.

7 There is also a need to help such 'changemakers' address how to sustain the momentum, stop prevailing practices felt to be unhelpful, and extend their learning into the wider organisations, systems, and communities. Such an approach should generate learning about how to overcome the 'implementation gap' or replication crisis.

8 Attention needs to be paid to how strategic ambitions for change translate into change on the ground, given workload implications and resources. Leaders with power to influence change need to be visibly involved and able to create the enabling conditions that allow for experimentation and the embedding of successful approaches. Senior leaders may benefit by being able to experience it for themselves as participants.

9 There is no script or manual for this way of working. Experimentation needs to be viewed as an experiential learning process; there needs to be a clear learning structure, designated roles, and time to synthesise lessons, embed promising practices, adapt if needed by changing course, developing new ideas, perhaps include new voices, and further explore and dismantle barriers to change.

10 There is a need to recognise that thinking about values in a professional context is not new and to be aware of the risks of scepticism, 'change fatigue' or a sense that it is 'other people' that need to change. The challenges for staff of the shift to 'working with' and not 'for' people must be acknowledged and frontline staff must be able to see how it will transform their ability to help people and have opportunities for self and peer reflection.

11 Combining community development with organisational and professional development will help to explore the added layers of complexity that arise through professional practices, values and working assumptions that create the organisational culture.

12 The creation of a learning community, with practical opportunities for participants to learn from each other is a valuable strategy to build capacity and embed learning and help multiple stakeholders, including parents or community members, to think of themselves as a collaborative network. Face-to-face opportunities for joint learning and sensemaking are valuable but on-line meetings are also a valuable way to 'connect the system to more of itself'.

13 It is useful to have a branding or shorthand way of referring to your approach. Growth or gardening metaphors neatly encapsulate the need to keep and build on some elements of past practice, as well as shift the emphasis away from some traditional metrics and approaches to learning and change.

14 To support system change, funders need to adopt an exploratory and enabling approach. Boards need to adjust to distinguish more clearly between the 'accountability space' and the 'learning space'; the former with duties and responsibilities clearly described and demarcated, and the latter as a more, free flowing, emergent and less rule-bound space, where rewards and incentives are linked to curiosity and experimentation, rather than standardised KPIs and metrics.

Understanding scale and impact

15. Making change happen at scale is hard, complex, and non-linear. It can't be 'delivered' but is a collaborative endeavour that crosses organisational boundaries and must be co-created and shaped locally. The reality of achieving impact at scale is about weaving different strategies together and building on what others are doing, recognising the limitations of what any brief experimental programme can achieve on its own.

16. It is important to clarify what different stakeholders mean by scale and to establish ways to identify meaningful achievements that build towards impact at scale, so that achieving scale and impact becomes a conscious choice. Distinguishing between three types of scaling is helpful. These combine qualitative and quantitative elements: replication and greater numbers (scaling out), changes in formal and institutional structures (scaling up), and shifts in the embedded cultural values and beliefs (scaling deep).

17. The development of the WM2U Learning Framework might be seen as one of the strategic levers for scale, by using data for transparency of ambition and insights, collective appraisals of progress and building the evidence base.

18. In relation to the evaluation of impact, theories of change approaches that focus on 'sense making', rather than being a literal, prescriptive or measurement device and narrative approaches that centre on the use of stories are usually preferred. Approaches to considering contributions to impact differ: outcome evaluation based on multi-vocal accounts from key informants and participants offers a complexity informed approach to evaluation, that develops an understanding of contributions and the highlights the attributions made by those most close to the change work.

19. There is a need to reshape data at national and local level to raise the priority of addressing known deficiencies in data, specify what data would support the monitoring of preventative measures, include the voice of lived experience, allow the monitoring of progress rather than reporting for its own sake, and build data skills and cultures that incorporate data into decision making and practices.

A blueprint of our learning approach

We have developed a graphic 'blueprint' that represents the key elements of our approach to learning as outlined in the summary points above. Whilst this is still work in progress, we anticipate that this will help to link the review findings with the proposed WM2U learning approach.

Families need help at the right time

We listen to understand and connect when families are ready

Families get help at the right time and we see a difference on the ground

We embed and share our learning and keep learning

Families know where to get help if they need it

We build on enablers and unpick barriers to change and act on, and share these

We are alongside families in the community, provide practical help and connect further within the community

Capture impact. What do our stories and other data tell us?

We test and learn together alongside families

We find allies in change amongst the community and services and connect to common purpose

System change practice examples
Dartington Service Design Lab

Dartington are a research and design charity dedicated to improving outcomes for children and young people. Their recent strategy paper reflects their development since their origins in the 1960s.[1] Their focus has shifted from an approach characterised as 'What Works' that placed Randomised Controlled Trials (RCTs) at the top of a hierarchy of evidence, to one that recognises the benefits of integrating 'What Works' with a 'Co-Production' and a 'Complexity' approach, so that the shortcomings of each is complemented by the strengths of the others. They propose that key actors and agencies, policymakers, funders, and commissioners should adopt this thinking and "support a 'wide-angle' systems lens".

They have recently used this approach in the EASC National Lottery funded work in Renfrewshire, *"Promoting Young People's emotional wellbeing and addressing emotional coercive control in adolescent relationships."*[2]

The approach adopted by the WM2U learning partner team, combining evidence reviews and outcome evaluation, co-design and system dynamics modelling, is based on a similar perspective to those adopted by Dartington. Other papers reviewed here make similar points, but helpfully, Dartington summarise the limitations of restricting investigation to a 'What Works' approach, which resonate with the experience of WM2U. These include:

- An emphasis on *proving* rather than *improving* has developed: generation of evidence which proves (or often doesn't prove) impact has often been at the expense of design and implementation which can respond to learning and improve practice over time.

- There has been a drive to package up 'evidence-based practice or programmes'. These resources can be insufficiently clear about the important mechanisms of change or 'active ingredients', and therefore lack guidance on how to flex for different, or changed, contexts.

- There has been a narrow focus on the impact of activities on outcomes in isolation, which diverts attention from both the systemic and contextual influences which can affect outcomes, and the wider, unintended, impact of activities.

- There has been an emphasis on aggregated estimations of impact, which can hide differential impacts and indirectly contribute to inequalities and discrimination.

- A focus on experimental and quasi-experimental methods may inadvertently devalue insights from case studies, ethnographic approaches, and qualitative methodologies, leading to a limited view of what constitutes robust evidence.

- Stemming from all of the above, they propose there is an unfolding 'replication crisis' in which services often struggle to replicate impact from evaluations of other services.

This approach has perhaps also shrunk the everyday understanding of evidence and approaches to evaluation, rather than being understood as posing, and answering many questions. Furthermore, this does not build the capacity for learning that can underpin sustainable progress in doing a better job in responding to what matters to children and families.

Other elements that Dartington have highlighted have also been developed within the WM2U approach:

- Co-production aligns with the multi-voice participative WM2U approach to engagement. The Learning Framework is based on outcomes established through continuous dialogue with community members and professionals. Shared reflection in the learning communities will generate feedback about the impact of change efforts and ideas for further change.

- The participative approach of WM2U is based on a recognition of complexity, with system feedback processes making it important to allow for learning itself to influence an evolving response. There are insights about the functioning of a system as complex as the one we are dealing with, that cannot be grasped intuitively or generated from community engagement. System Dynamic modelling offers a way to gain such insight – often this is about revealing hitherto unrecognised causal links between apparently separate parts of the system.

- System Dynamic modelling also brings other benefits. One is that the process of creating the model brings together in dialogue, actors within the system who contribute their expert understanding of their component of the system to build the wider interconnected picture in this sense the model *integrates* elements that are often seen as separate. The diagram of the system provides a visual map against which practitioners, managers and policy makers can plot particular activities, problems and begin to see connections; we call this 'Connection Explorer'. In this way, it is easier to avoid the common challenge of talking at cross purposes about 'the system'.

Changing Futures Northumbria

Changing Futures is a 3 year £64 million project that seeks to test new ways of bringing together the public sector and communities. Northumbria is one of 15 Changing Futures projects across the country. Funded by the Department of Levelling Up, Housing and Communities and the Lottery, it is a partnership of six local authorities, the Police and Crime Commissioner's Office, local NHS trusts, and a variety of voluntary sector organisations.

The Changing Futures team aims to make it easier for people to access the right support at the right time and through the right channels by:

- **Abandoning eligibility criteria and instead working relationally with people responding directly to what matters to them and, in this way, building trust.**
- **Developing a regional learning infrastructure. The caseworkers are divided into four Touchpoint Teams across Tyne and Wear. Each team includes a 'learning lead' who runs debrief sessions with team members twice a week to learn about what needs to change in the support system. Insights and observations are shared across the region so that learning can be acted upon.**
- **Adopting an experimental approach to governance. Senior Leaders or 'Regional Enablers' across the region use their relationships to share learning, unblock issues and use their influence to make more substantial changes to make the system more responsive and supportive.**

The team claims to have made considerable progress in defining areas for future learning, particularly in the areas of collaboration, mobilisation, capacity and developing collective leadership. But they are only a year into their work, and as yet no formal progress reports are available.

Human Learning Systems (HLS)

Human Learning Systems is an approach to learning and change promoted by The Centre for Public Impact, an international non-profit with interests in reimagining government, core funded by donation from the Boston Consulting Group. With four teams across the world, CPI operate in Europe as a registered charity and work alongside several UK based consultancies and academics as associates.[3]

HLS is based on a critique of new public management that relies on standardised metrics and performance indicators. This approach was explored in our earlier literature review, which highlighted the particularly useful elements of experimentation and continuous learning (WM2U, Dec 2019). HLS has been supported at various times by different funders including Lankelly Chase, the Tudor Trust and the National Lottery Community Fund.

A guide to Human Learning Systems has recently been published by Healthcare Improvement Scotland (HIS) and Iriss, both organisations that focus on improvement across health and social care in Scotland.[4] This is of particular interest at this time because HLS is seen to link the outcomes focus and empowerment agenda of public policy in Scotland with the improvement methodologies used by HIS. HLS is not a single method or a blueprint but is described by HIS and IRISS as providing 'just enough architecture' for good work to flourish using a learning cycle approach, of the three core elements of being human, continuously learning and nurturing healthy systems.

The abbreviation or social media hashtag (#HLS) is sometimes used a catch-all label for other relational and change orientated work. There are an increasing number of case studies now highlighted in publications, which have become badged as HLS.[5]

In East Ayrshire, the Corra Foundation are now in the early stages of the development of the *Moving Up Moving On* programme in Cumnock as a 'HLS experiment' as part of place-based work, supported by HIS. Whilst this work has a recovery focus, there are connections with The Nest (which will welcome members of the recovery community) and some of the parents that are part of WM2U are also connected to this emerging work.

In summary, there is much interest, value and potential synergy in the ethos and approach of HLS alongside a risk of misrepresentation or dilution, for example, of the distinctive part that the voice of parents makes to WM2U.
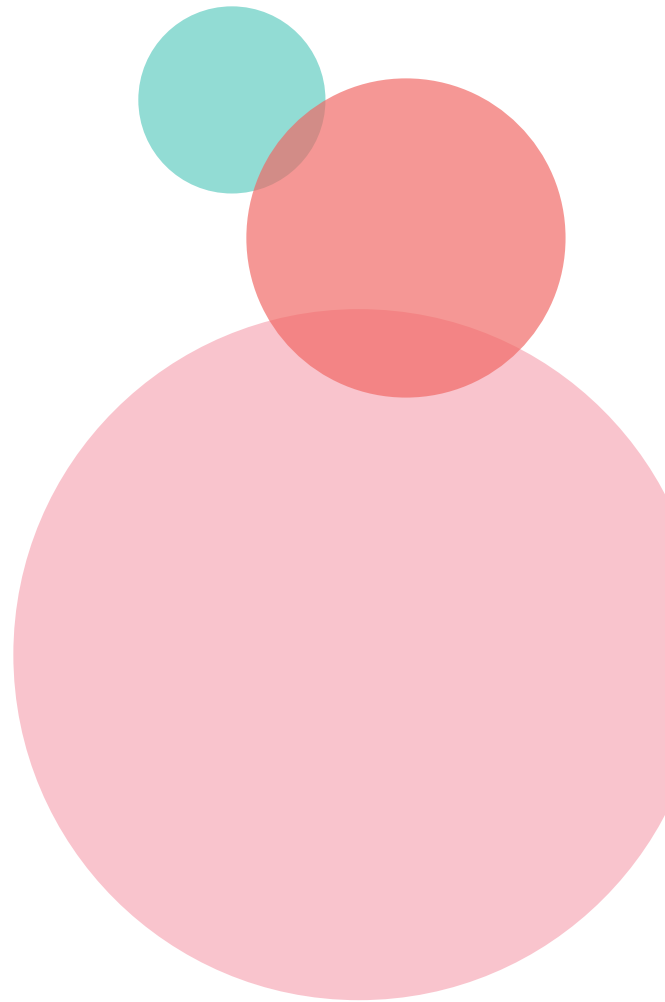
King County, Washington (Centre for Public Impact)

This is a useful case study facilitated by CPI of a programme of research, experimentation and learning with a group of employees from local government departments in King County to address the issue of 'how can governments live out their values – and by extension– create the public value they set out to achieve?'[6] Note that this focused on internal change within County departments, with an aspiration to bring community members into this work in the future, 'recognizing that public value is best created when it is done alongside residents themselves'.

Described as a *principles-based approach to systems change* this case study demonstrated that it is best to proceed humbly through a 'test and learn' approach, taking a more empowering and inclusive approach, rather than mandating top-down change. The work started by seeking to understand the system, followed by a period of co-designed experimentation with ways to change it for the better, and finally, deep reflection on learning.

Recognising the limitations of what a brief experimental programme can achieve, the case study highlights the value for staff of:

- Creating intentional time and space to question the status quo.
- Embracing uncertainty and the opportunity to learn from failure.
- Shifting focus from the day-to-day ("doing") to the core purpose of the work ("being").

"Many participants gained a new perspective on uncertainty and failure through this process. They came to see perpetuating the status quo as riskier than trying something different, even if it fails. Further, having a set of guiding principles to inform decisions and actions helped participants feel more comfortable with uncertainty and failure because they knew that the County's values had informed those decisions and actions."
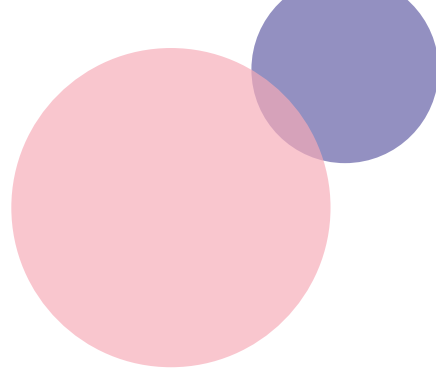
There are some useful lessons for WM2U about experimentation for teams and strategic leaders, and about embedding learning and influencing the system:

- By testing small interventions alongside those with lived experience, experimentation helps public servants quickly understand what does and does not work, and it may lead to broader insights that have applicability in other areas.

- One of the keys to success for the group was remaining open to seeing where the experimentation process took them and changing plans based on new learning. Teams need to view experimentation as a learning process: capturing lessons from experiments, iterating, and translating insights into new practices, behaviours, policies, and structural changes to the organisation.

- Capturing lessons learned and creating intentional time and space to make sense of those lessons is an essential part of this process - and essential to becoming a true 'learning organisation.' After synthesising lessons, there is an opportunity to change course, develop new ideas, include new voices, and further explore and dismantle barriers to change.

- Leaders within an organisation who have the power to influence change need to be able to create the enabling conditions that allow for experimentation (and the associated risk-taking) and be vulnerable enough to make broader changes based on learning. Doing this involves creating the structures that allow change to take hold and start to feel like business as usual.

CPI believes that 'this model - one that prioritizes and makes space for experimentation, trust, learning, human relationships, and equity - is one of our best hopes for engaging in the meaningful change required to reimagine government so it works for everyone'.

Collective Leadership for Scotland

Collective Leadership for Scotland (CLfS) provides Scottish Government funded facilitative and bespoke learning support to inter-professional teams working with systemic issues which reach beyond the boundaries of traditional hierarchies and public institutions. CLfS place-based sites have also addressed a wide range of issues including how to achieve the best outcomes for children and families through better collaborative between schools and social work in Fife. CLfS work was included in our last literature review.

More recently, there has been an evaluation of three CLfS place-based pilots working with the Police and Local Government, funded by the Scottish Institute for Policing Research.[7] One of the important elements of the success of the programme was identified as the creation of an entirely on-line learning community, with practical opportunities for participants to learn

from each other. The SIPR evaluation concluded that of all the skills required for effective collaboration, collective and immersive learning is the most valuable. There are other lessons for WM2U worth highlighting:

- In relation to convening of teams or groups to take work forward, attention needs to be paid to the composition of the group, giving the group time and space to develop a shared focus, and ensuring that participants felt that they had the mandate to take the work forward so that it isn't seen as an additional or new work stream. This worked most successfully where there was 'buy-in' at executive level.

- In valuing their own learning about the power and importance of working with colleagues in a locality, participants were interested to consider how they could sustain the momentum, stop prevailing practices that

they felt were unhelpful, and extend their learning into the wider organisations.

- There was interest in supporting senior leaders to 'see the power of the work', perhaps by being able to experience it for themselves.

Collective Leadership for Scotland (CLfS) is also of interest because of the approach to impact and evaluation, using a similar embedded evaluation approach to the WM2U work.[8] They suggest that more integrative and adaptive approaches to learning and change are now much more visible across public service systems and philanthropic grant-making trusts and position this work amongst UK and international work that recognises the limitations of previous approaches to effect learning and change and valuing emerging new approaches, including evaluative practices. Their most recent report contains rich learning about how to cultivate collective leadership in practice, the enablers and barriers to systemic change, facilitation, being on-line and the use of stories and collective sensemaking.[9]

In considering how to conceptualise and measure impact, the report uses the idea of 'action confidence' or a change in relationship to taking action as an indicator of transformative change.[10] Colloquially this might be thought of as a move away from feeling 'stuck'. Such a change in perspective becomes tangible as changes in the ways people see and think about themselves and their role as a leader, changes in the way they interact with, perceive, pay attention to others, and changes in action that they take as individuals and with others, towards that which is more inclusive and collaborative.

The scope to empirically measure the impacts of such developments depends in part on the nature of the 'action space' and is generally

greatest amongst place-based work where there is shared focus on system change at a local or thematic level. Such contexts provide extended opportunities to co-create and test out desired actions, with a strong imperative for the issue to be resolved collectively, and motivation, confidence, and capacity to act can be influenced by the group. This contrasts to more networked approaches where people may come together with others with shared interests for a short time, but do not have a shared task that they can only tackle together. In such situations any impact is more dispersed amongst wider teams and organisation and harder to identify or measure.
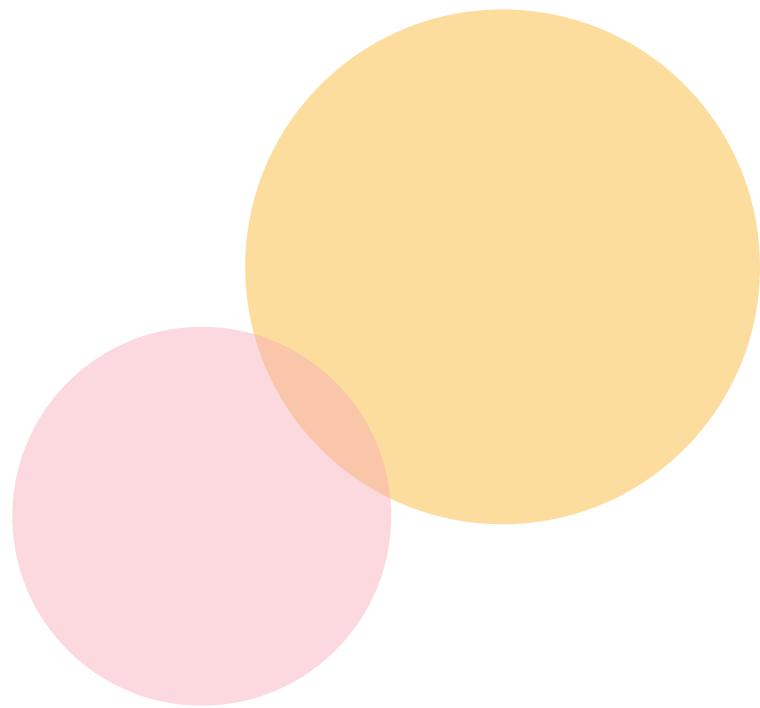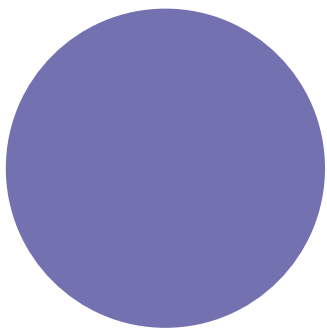
Early Action System Change (National Lottery Community Fund)

In March 2018, The National Lottery Community Fund (The Fund) in Scotland awarded £5.9 million to eight multi-agency partnerships in an initiative known as Early Action System Change (EASC). EASC is intended to accelerate the shift to investing a greater proportion of public resources in effective, early action and re-focus efforts towards a longer-term preventative approach. The eight partnerships cover one of two themes: children, young people and families facing significant challenges and women and the criminal justice system. This work was mentioned in our earlier literature review, which also noted that the Lottery also established a Learning Support contract.[11]

This learning support was put in place in response to an identified need for collaborative working and sharing learning and best practice among the partnerships. This learning support is now ending and there are a series of learning briefings that focus on the substantive learning arising from their efforts to support system change.[12]

Always designed to be primarily online, the focus has been on an experiential approach to learning support and there has been clear value in the conversations amongst the partnerships which have acknowledged the tensions of their work and built trust and an openness to share and learn from one another. In preparation, the final report is also likely to highlight learning about the convening and facilitation of disparate individuals and organisations into a 'learning community' that coalesces around a shared purpose and in support of their practical learning.

IGNITE

Ignite was a partnership formed between two third sector organisations in Coventry, Central England Law Centre and Grapevine, to respond to an opportunity offered by the Early Action Neighbourhood Fund (EANF). Funded by The Big Lottery Fund, Comic Relief and the Esmée Fairbairn Foundation, Ignite was one of three pilot projects testing early and preventative action approaches in public services in England, featured in our earlier literature review.

The first phase of the Ignite programme, ran for five years 2015 to 2019 in partnership with Coventry City Council Children's Services and Whitefriars (now Citizen) Housing, with the intention of using the third sector to stimulate a shift to early action within the public sector. Deep learning from practice is available through the publication of their story of activating early action.[13] There is also a further learning briefing, based on an online learning session hosted by Ignite for the Early Action System Change partnerships in Scotland.[14] Their work is explicitly experimental, focused on continuous learning and illustrates the very real on the ground challenges of shifting organisational cultures. Ignite suggest that there is 'no script' for this unfamiliar way of working, which 'can feel exciting and scary at the same time'. A willingness to be flexible and adapt to changing circumstances along the way is essential.

Their reflections acknowledge that they underestimated the opportunity to get people who were using services and who were 'story tellers in their own right', to become part of the change. They also gained significant learning about how to engage with staff: 'true collaboration requires that we think and engage in ways that show that we are all in this together' and compliance is not a good basis for engagement or learning.

> "Ultimately this approach needs buy-in from frontline staff, who must be able to see how it will transform their ability to help people. It is relatively easy to set up governance arrangements ... so you're having those dialogues at strategic level all the time, but the real gold, is to be discovered in the people that are 'doing the do'."

Early Help Manager, Coventry City Council

There is a great deal in this experience that WM2U could build on: For example:

- **The challenges to shift to 'working with' and not 'for' people are acknowledged; an element of this is the need for change in how people in need of help perceive staff and organisations. Subtle but important shifts in everyday, inter-personal transactions are needed for staff to really be able to 'be alongside' people. Such relational practice needs a degree of genuine collaborative inquiry, based on self and peer reflection that is far from common practice.**

- **Whatever successes can be achieved through the primary approach to change, there is a need to combine community development with organisational development, to explore the added layers of complexity**

that arise through professional practices, values and working assumptions that create the organisational culture.

- **Because poverty is pervasive, it is a significant barrier to system change when services fail to take account of it and compromises attempts to meet people early in their problems. Ignite are now focusing on poverty-informed services to support everyone working to help people at any stage to understand and reflect this in the way they work.**

Ignite acknowledge that a big part of what has made their learning possible has been the attitude of the funders, who have adopted a genuinely exploratory and enabling approach, rooted in an understanding that the work is both experimental and experiential, that needs to be rooted in shared learning.
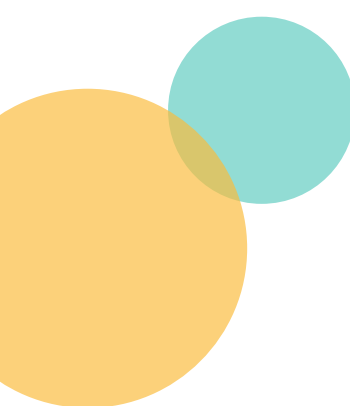
Review of Additional Support for Learning (Radical Redesign)

Angela Morgan's review of Additional Support for Learning identified the need to radically redesign the way support for learning is implemented.[15] This included adopting a more relational and child centred approach characterised by:

- Values driven leadership.

- An open and robust culture of communication, support and challenge underpinned by trust, respect and positive relationships between children, young people and their parents/carers, school staff and other professionals.

- Recognition that the current 'narrow dominance of qualification results' are inadequate measures of success.

- Commitment to improvement through experiential learning (learning by doing), reflection and review processes that encourage and support innovation and continually 'test the gap between intention and reality.'

The Review was endorsed in the 2020-21 Scottish Programme for Government.[16] The *Radical Redesign* programme was developed as a response to this review, funded by *East Lothian Council* to support parents and schools to work together more collaboratively to benefit young people with additional support needs. The work involved parents, teachers, and professionals from third sector organisations working together to design ways of addressing issues which were of concern to parents and pupils.[17] The 'tests of change' focused on improving the transition process between primary and secondary schools, and developing a stronger communications process between parents, pupils, and the school. The work has been recognised by staff, parents and pupils as having had a significant impact and a final report will be published by the end of 2022.

The Corra Foundation

The Corra Foundation (formerly Lloyds TSB Foundation for Scotland) is the largest Scottish independent grant-making trust and works with many people, communities, and organisations in Scotland and beyond. Their Ten-Year Strategy (2020-2030) aligns closely with the ambitions of WM2U, as Corra seek to develop new ways of working as well as building and deepening partnerships, working alongside communities, and with a growing focus on supporting voice, power, and action.[18] They have a strong focus on supporting the development of community spaces, whether through asset transfer or hire of community spaces.

The Corra *People in Place* programme is currently working alongside eight communities in Scotland, supporting local people to connect, collaborate on ideas, and take action to create positive change. In Ayrshire, this programme operates in two communities, Blacklands (Kilwinning)[19] and Cumnock[20]. Each area has a dedicated Community Co-ordinator, working alongside local people in a single, small community, committed for the long term, and adopting a networking or brokering role that operates without the confines of predetermined policy or legislative outcomes.

This programme includes an annual budget geared towards supporting communities to remove barriers and move their ideas into action, known as the *Ideas into Action Accelerator*. This relatively small-scale funding is an additional tool for each local coordinator in their work of building trust, relationships, voice, participation, and community-led action, and seeks to bolster their independence and sustainability for the long term. There is also further funding for some specific capacity building work.
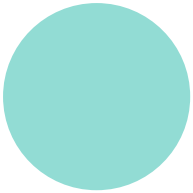
Corra have a strong interest in learning, in particular, how their experience of getting alongside communities can be developed for larger-scale communities in Scotland. They are also interested in sharing their learning about participatory grant-making. Corra are also part of a Human Learning Systems initiative alongside Healthcare Improvement Scotland.

In relation to WM2U, Corra are established allies and close partners, both in the community of Cumnock and more widely. There is strong synergy between our relational approaches rooted in lived experience, shared interest in developing and demonstrating the impact of voice-led systems change and learning about the value and operation of more light-touch funding mechanisms, such as the WM2U Make it Happen Fund. Given these alignments, there is also continuing scope for mutual and critical friendship to sustain bold ambitions and considered risk-taking over a long-time period.
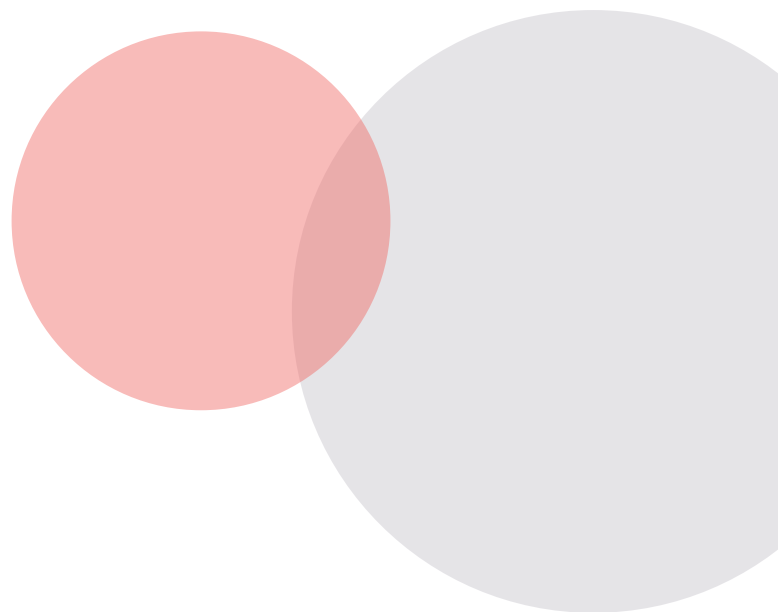
Social Innovation Partnerships: The Family Wellbeing Partnership (Clackmannanshire)

The Social Innovation Partnership (SIP) is a collaboration between the Scottish Government, the Hunter Foundation, and a selection of social entrepreneurs originally launched in 2016. There are 13 current SIP partners working primarily in communities where there are significant levels of poverty and related forms of disadvantage. SIPs adopt 'relational' approaches which aim to create closer and more equal relationships between people who are providing and accessing support, with the goal of supporting significant change in how public services respond to the impact of poverty on individuals and their communities. [21] The evaluation of the SIP is in its final stages and the report will be published in March 2023. Of immediate relevance to WM2U will be the focus on the efficacy of relational approaches to support and the place of lived experience in the design and delivery of support.

The Clackmannanshire Family Wellbeing Partnership, an initiative aligned to the SIP, aims to develop the well-being and capabilities of families in the locality, bringing together Clackmannanshire Council, local partners, the lead partners in the SIP and the educational leadership organisation Columba 1400. A recent unpublished case study of this work undertaken by the learning partner to the SIP looked at the experience of values-based leadership experiences (VBLEs), and the key findings have been shared with WM2U to identify relevant learning. This values-based model of change is being used by WM2U and there are some specific lessons that are transferable to the situation in Dundee and East Ayrshire.

The case study concluded that participants in the VBLE benefited from the programme and had broadly positive experiences, but a key insight for WM2U is that greater attention to systemic challenges and purpose is

needed to help to shape expectations both for the programme and what happens next in a positive and achievable manner. In the convening, design, and execution of the VBLE programme, it is important to pay attention to:

- **The importance of a clearly communicated invitation and clarity of aims and purpose of the change programme. Participants need to fully understand why they are part of the VBLE programme, with questions of purpose to the fore during the programme itself. This will recognise that thinking about values in a professional context is not new and so avoid the risks of scepticism, 'change fatigue' or a sense that the programme is really for other people.**

- **Giving voice to tensions between the focus on individual leadership and the need to tackle some issues at a corporate rather than individual level.**

- **Questions about how VBLE connects to wider commitments to support change and institutional support for the changes being discussed amongst participants and how strategic ambitions for change translate into change on the ground, given workload implications and resources.**
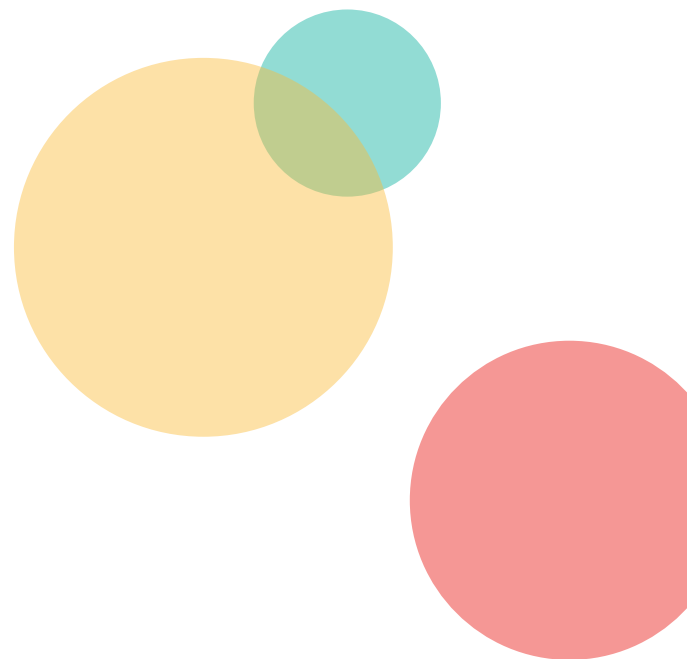
Examples with a focus on strategic learning and scale

Giving Learning a Seat at the Strategy Table, Carnegie/IVAR August 2021

This is a blog written by the Institute for Voluntary Action Research (IVAR) for Carnegie UK, based on work they have recently done together to explore where and how learning fits into governance.[22] This has produced a 'Learning Statement' that highlights three ways to put learning at the heart of the Foundation's practice and decision making. Likely to be of interest to other philanthropic funders, these are:

- **Articulate the meaning of learning; for example, identify what kind of learning matters most to the Board and develop a shared language around learning.**

- **Embrace the concept of strategic learning: to ensure that lessons are timely, actionable, and forward looking, shifting the focus of attention away from scrutiny and oversight, toward curiosity and adaptation.**

- **Recognise that how you do it matters: make the transition to a different climate of 'continuous learning governance', to embrace the idea of more open-ended conversations and interactions. These needs to be done in a spirit of willingness to 'give it a go', trusting the integrity of the process and the belief that this is the right thing to try.**

The account distinguishes between the 'accountability space' and the 'learning space'; the former with duties and responsibilities clearly described and demarcated, and the latter as a more, free flowing, emergent and less rule-bound space. Navigating the shift and the tensions between these two spaces will take some adjustment and require 'kindness and patience'. The report flags up the need to consider how rewards and incentives are structured so that they linked to curiosity and experimentation, rather than standardised KPIs and metrics.

Preserve, Grow, Compost. Reflections on the process of creating Carnegie UK's new impact learning framework, 2022

Carnegie have also published a report that shares reflections from the process of creating a new impact learning framework that shifts from monitoring impact to 'prove' change, to using information and learning gathered to 'improve' their work. This report is one of a suite of reports from commissioners and philanthropic funders in the UK and internationally that recognise the need to rethink many aspects of approaches to impact and evaluation, and the need to have honest conversations about creating better forms of accountability, in recognition of the limitations of previous approaches to effect learning and change.

The report includes consideration of how power influences how foundations understand and measure impact and how they consider their own contribution alongside those of others. It also considers the tension between impact measurement driven by demands for accountability, with measurement to inform learning and improve practice.

In relation to approaches to evaluation and learning, the report notes the increasingly common practice for foundations to commission learning partners to take on 'mentor, mirror, and midwife roles' which can support reflective spaces and processes.

The report acknowledges that the approach of looking for contribution not attribution is now common practice, perhaps in recognition of the non-linearity and complexity of systems and the engagement of multiple stakeholders that need to think of themselves as a collaborative network. Whilst it acknowledges that approaches to considering contributions differ, narrative approaches that centre on the use of stories are usually preferred. WM2U might also note that the report welcomes the use of theories

"Power cannot be ignored when it comes to understanding impact; not only in terms of involving communities, but also in terms of conceptualising what impact means; how value is determined; how change is assessed; who should benefit from learning; and whether practises in all of the above enable or inhibit people's voice."

of change approaches where the purpose is about 'sense making', rather than to be literal, prescriptive or as a measurement device.

Finally, note the adoption of a growth or gardening metaphor: 'preserve, grow and compost', that neatly encapsulates the need to keep and build on some elements of past practice, as well as shift the emphasis away from some traditional metrics and approaches to learning and change.
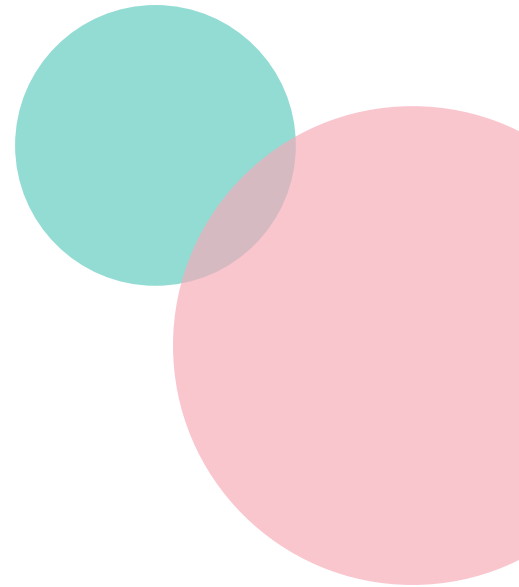
Changing Lives, Changing Systems: Building Routes to Scale, Social Finance, 2021

This report shares a 'Routes to Scale framework' to help others plan for impact at scale.[23] It suggests that making change happen at scale is hard, complex and non-linear. People working towards impact at scale often talk at cross purposes and there are not common definitions around their aims. Based on the premise that recognising that impact at scale is a collaborative endeavour that transcends organisational boundaries, it suggests that the reality of achieving impact at scale it is about weaving different strategies together and building on what others are doing. Whilst money is often a necessary ingredient in scale, it is a means and not an end. A salutary note is that an organisation or issue that secures significant funding has not automatically scaled impact.

After reviewing case studies, it concludes that a qualitative rather than quantitative definition of 'impact at scale' is most workable. They offer a definition of impact at scale as:

"Impact at scale is the lasting change in people's lives and society we see when products, services or practices sustainably expand their nature and reach, when systems embed change or when society and culture shift their perspective."

Recognising the long timescales involved in achieving impact at scale, they propose the use of 'building blocks' to understand the direction of travel working in collaboration with

others with complementary strategies and capabilities. Their framework identifies three foundations: strong partnership, consistent funding and a clear story and the use of various strategic levers to put the building blocks in place. Building blocks might include identifying meaningful achievements in building towards impact at scale, and useful goals to track and measure progress that span the widespread change that is needed on an issue.

Issues of scale were addressed in the WM2U Learning Partner Interim Report (March 2021) and distinguished between three types of scaling:

- **'Scaling Out' is most akin to the traditional view of 'going to scale' or rollout where the focus is on replication of a successful intervention with greater numbers of people.**

- **'Scaling Up' refers to impacting on the formal and institutional structures that might hold a problem in place.**

- **'Scaling Deep' refers to the embedded cultural values and beliefs, whether formally expressed or otherwise, that continue to reproduce unwanted patterns in complex systems that act as barriers to change.**

Our interim report concluded that for any systemic change, scaling needs to happen at all three levels and that there is a need to 'make scale and impact a conscious choice'. The development of the WM2U Learning Framework might be seen as one of the strategic levers for scale, by using data for transparency of ambition and insights, collective appraisals of progress and building the evidence base.

Policy and wider context
Accounts Commission, Tackling Child Poverty (September 2022)

The Accounts Commission published its report *Tackling Child Poverty* in September 2022.[24] This assesses progress against the Scottish Government's plans to address this issue. A second delivery plan for 2022-2026 was published in March 2022.

The report notes that in 2019/20[25] more than a quarter of children in Scotland were living in poverty – higher than when targets were set in 2017, and the current increases in cost-of-living risk even more children experiencing poverty.

In relation to what this means for children's lives, they state that poverty affects every aspect of their wellbeing and life chances and has wider implications for society. Children living in poverty are more likely to have health issues, including mental health problems, gain fewer qualifications, experience stigma and bullying at school, and be at higher risk of being care experienced.

The Audit Commission report challenges the Scottish Government to go further in the second delivery plan, seeking a more joined-up approach across central and local government and with partners, including detailed joint planning between national and local government to deliver the actions and evaluate their impact. There are also repeated references to the need to include the voices of those most impacted:

"The views of children and families living in poverty are not always meaningfully considered as policies and actions are developed, implemented and evaluated."

The inclusion of such views is also relevant to the question of identifying necessary data as 'gaps in data at both national and local levels hinder the development of sufficiently targeted policies, and limit effective impact assessment.'

The Promise Oversight Board Report (May 2022)

The Promise is the product of the Independent Care Review that concluded in 2020 and continues to be an important contextual feature for the work of WM2U. There is now a national programme of work to deliver on the analysis and recommendations that emerged from that review. These place expectations on every local authority and organisation whose work is relevant to children and families. The first report of the Oversight Board was published in May 2022.

There is much in The Promise programme that is relevant to the work of WM2U. The programme seeks to address not only the experience of children and families but all aspects of the system that should underpin and enable a positive experience, including, for example, poverty reduction.

The focus of The Promise is primarily on children and families engaged at some level with the care system. The more general scope of WM2U has the potential to complement that focus, and perhaps to help develop preventative approaches that help families to flourish avoiding the need for contact with 'care'.

Key findings of the first report are that:

- Available data across the complex web of organisations whose responsibilities have a bearing on the lives of care experienced people is insufficient to understand children's lives or monitor progress in addressing what matters to children, families and care experienced adults, and appears instead to have evolved to meet the needs of 'the system'.

- Measurement is too often restricted to things which are easily quantifiable, rather than things that matter, such as a child's personal development as they grow older.

- Statistics to be reported are selected in order to demonstrate progress against targets rather than to help understand the extent to which positive change is experienced in the lives of children and families.

- There are important gaps in relevant information, either in relation to raw numbers (e.g. the frequency of restraint) or in relation to what is driving those numbers (e.g. the rising number of young people on remand).

- There are also issues about how some data that is collected is analysed or how it is used (e.g. school attendance, achievement, attainment and positive destinations).

The report calls for a reshaping of data to allow the monitoring of progress in delivering those things that matter, to include the voice and the stories of those interfacing with the care system. This means changes to 'how data is defined, whose story and voice is heard and how we view the information'. The challenge, at minimum, for agencies to meet the data required to monitor progress in fulfilling The Promise, is to incorporate systematic information about those things that matter to children and families who are care experienced, and then to analyse and digest it.

We have found similar issues from our work in WM2U. One of the data challenges identified in the work of WM2U is the fact that flow information, that tracks people between one state and another, e.g from foster care back to birth family is often not available – and has not historically been seen as necessary to collect. Use of such data in a model can generate insights that are not available just by considering the number of people in those states. The absence of those insights can lead to misdiagnosis of the challenge and 'solutions' that are ineffective or even make the situation worse.

Local authorities and partner agencies considering how to rise to the challenges set by The Promise will be looking for tried and tested models. It may be that aspects of WM2U will offer such models, potentially also including insight into data configuration, analysis, and integration.

Radical action needed on data, Audit Scotland Blog (November 2022)

Audit Scotland recently hosted a roundtable from across different parts of the public sector and from academia, summarised in a blog post by the Audit Director, Performance Audit and Best Value.[26] This emphasises the crucial importance of data to address the challenges that face public services. The blog suggests that for some, the exponential growth in data and attempts to manage it have created 'a bit of a mess', and 'we are not where we want to be'. Amongst other factors:

- Data is often seen as a burden for public bodies, rather than the key to better policy decisions.
- People producing data are often stuck in a cycle of reporting for reporting's sake.
- Often those people capturing data are on the frontline, already hard-pressed, and don't see its wider benefits, leading to missing or poor-quality data.

There are concerns that data will be misused if shared.

As part of the wider context in which WM2U is operating and to which it may contribute, this is a very helpful articulation of the mindsets and the dynamics that lead to a low priority being given to addressing deficiencies in data. It also includes recommendations for what is needed at national and local levels, which include:

- The need to weed out duplication and focus limited resources on the preventative measures (and data) needed, including identification of what data collection can be stopped.
- The need to build data skills and a data culture across public bodies including harnessing the strengths of universities and the private sector is important, as well as those working in data across public services.

The blog also identifies relevant work underway.

- A new data strategy for health and social care is due to be published in early 2023.
- Public bodies are participating in a 'data maturity pathway' to understand where they are and what they need to do.[27]
- There is emerging work on data standards and developing data catalogues in local government.
- Innovative programmes such as the Data for Children Collaborative with UNICEF is also mapping data based on 'what matters' for children and families.

The Independent Review of Children's Social Care (England, May 2022)

The review seeks to address the same concerns about poor outcomes for children in or on the edge of the care system as those that have driven the Scottish Independent Care Review. There is also a specific concern about the shortage of placements for children who need them.

The main response is to focus on provision of better support to families by setting up 'Family Help Teams' and following the publication of the review report there are discussions about what the best composition of such teams would be to best establish acceptance by families and ensure local connections.[28] The term 'family' is interpreted widely to encompass the network of relevant people.

The focus on families contrasts with the current emphasis on planning separately for each individual child. A further, logically following, recommendation is that instead of having separate categories of work, "targeted early help" and "child in need" there should just be the single category of "Family Help". The report from the review works through implications of these recommendations including the need to draw specialist help and the need for workforce development. The need to improve inter-agency information sharing is identified as a challenge that needs to be addressed to identify the most vulnerable situations.

Endnotes

1   Dartington (2022) An integrated approach to evidence for those working to improve outcomes for children & young people, https://static1.squarespace.com/static/5c86931b4d87114c07db1adb/t/620d1cf65d442e5ec1944c27/1645026589266/Integrated+Approach+Dartington+Service+Design+Lab%27s+Strategy+Paper.pdf

2   Dartington (forthcoming) Early Action System Change: How can we prevent coercive control within adolescent relationships and improve emotional wellbeing? Reflections from 500+ young people and families across Renfrewshire

3   https://www.centreforpublicimpact.org/europe

4   Lowe, T., Padmanabhan, C., McCart, D., McNeil, K, Brogan, A and Smith, M (2022) Human Learning Systems: A practical guide for the curious, CPI, HIS and IRISS

5   Human Learning Systems: Public Service for the Real World, June 2021 https://realworld.report/

6   https://www.centreforpublicimpact.org/case-study/reimagining-public-value-our-learning-journey-in-king-county-washington?utm_campaign=Soundbites&utm_medium=email&_hsmi=223318386&_hsenc=p2ANqtz-8CWkzds2vzRXDrc4jlzAySoPqgfUd-UcaUj7o0_fSxm8qZhIOV3GL_sR2y2VLrEcl6uUKOf2fhgC9nPCh43QREcih0T_9B_mM2icaXkjW9ksuSV4M&utm_content=223318385&utm_source=hs_email

7   Docherty, K and Russell, B (2022) Police Scotland and Local Government Collaborative Leadership Pilots Evaluation, Research Report No 1, May https://www.sipr.ac.uk/wp-content/uploads/2022/06/Police-Scotland-and-Local-Government-Collaborative-Leaderhip-Pilots-Evaluation-Docherty-and-Russell.pdf

8   Sharp, C, et al, (2022) How do we know we are doing good work? Conversations about the impact of our collective leadership, Collective Leadership for Scotland, September 2022. https://collectiveleadershipscotland.com/wp-content/uploads/2022/11/Collective-Leadership-for-Scotland_Impact-Report_November-2022.pdf

9   Cathy Sharp has been a learning Partner for CLfS for several years and is the first author of this recent report

10 (2020) Pomeroy, E. and Oliver, K. 'Action Confidence as an Indicator of Transformative Change', Journal of Transformative Education, pp. 1-19, DOI: 10.1177/1541344620940815

11 Held by Research for Real/Animate to March 2023

12 These are all accessible from here https://research-for-real.co.uk/projects-and-clients/

13 Ignite: a story of activating early action (2021) By Emma Bates, Sue Bent and Clare Wightman (Ignite) with Cathy Sharp (Research for Real) https://www.centralenglandlc.org.uk/Handlers/Download.ashx?IDMF=f1aaadec-1de1-4c76-99f2-c0b889171ec3

14 "Learning As We Go" Early Action System Change NLCF Thematic Briefing 3 https://www.tnlcommunityfund.org.uk/media/insights/documents/Learning-As-We-Go-NLCF-EASC-Briefing-3.pdf?mtime=20210715180454&focal=none

15   All Our Children and All their Potential. June 2020 https://www.gov.scot/binaries/content/documents/govscot/publications/independent-report/2020/06/review-additional-support-learning-implementation/documents/support-learning-children-potential/support-learning-children-potential/govscot%3Adocument/support-learning-children-potential.pdf

16   Protecting Scotland, Renewing Scotland September 2020. https://www.gov.scot/publications/protecting-scotland-renewing-scotland-governments-programme-scotland-2020-2021/

17   This was facilitated by Animate, one of the WM2U Learning Partner team

18   https://www.corra.scot/corra-strategy-2020-2030/

19   North Ayrshire, part of a jointly funded Systems Changers programme with Lankelly Chase. https://www.corra.scot/place-based-working/getting-alongside-communities/blacklands/

20   https://www.corra.scot/place-based-working/getting-alongside-communities/cumnock-2/

21   https://i-sphere.site.hw.ac.uk/2022/06/23/social-innovation-partnership-learning-programme/

22   https://www.carnegieuktrust.org.uk/blog-posts/giving-learning-a-seat-at-the-strategy-table/

23   https://www.socialfinance.org.uk/sites/default/files/publications/building_routes_to_scale_0.pdf

24   https://www.audit-scotland.gov.uk/publications/briefing-tackling-child-poverty#:~:text=Over%20a%20quarter%20of%20children,risks%20making%20the%20situation%20worse

25   Data collection was impacted by Covid-19 and so data on child poverty was only available up to 2019/20

26   https://www.audit-scotland.gov.uk/publications/radical-action-needed-on-data

27   Data maturity is a measurement of the extent to which an organization is utilising their data, such that to achieve a high level of data maturity, data must be deeply ingrained in the organisation, and be fully incorporated into all decision making and practices

28   E.g. Centre for Social Justice and the Hadley Trust on implementing the Family Help Teams. (https://www.centreforsocialjustice.org.uk/wp-content/uploads/2022/11/CSJ-Children_in_care_response.pdf)