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BRIEFING PAPER



PARTNERSHIP APPROACHES



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EXPERIENCE OF A PARTNERSHIP APPROACH TO HELPING SEDENTARY PEOPLE BECOME AND STAY PHYSICALLY ACTIVE.

Briefing Paper Introduction:

In order to communicate the learning arising from the Mentro Allan project, papers have been written to suit different audiences. Study papers have been prepared specifically for researchers reviewing findings across a number of themes, whereas briefing papers are aimed at local or national project/service managers and policy makers. Each briefing paper covers a different topic although there are many aspects that inter-relate. Finally, practitioner guides are being written for those working in the field, directly delivering projects or activities, and case studies are being prepared to bring to life some of the lessons learnt showing what has been successful, what has been tried, and how some of the challenges have been overcome.

Background to Mentro Allan:

Creating an active Wales is central to our One Wales ambition for a healthier future for all. It recognises that sport and physical activity are beneficial to health and that a partnership across the Welsh Assembly Government, Local Authorities, the NHS, the Third Sector and our communities is essential if we are to gain the benefits of an active and healthy Wales¹.

The Mentro Allan (MA) programme² is a five year Big Lottery funded project and is actively supported by a diverse network of local and national partners. Its distinctive features are its:

- Aim to motivate a diverse range of sedentary groups to become more active;
- Focus on physical activity in the outdoors environment;
- Use of action research to involve its participants in achieving behaviour change;
- Gathering of evidence of what does and doesn't work in practice.

Key points of the paper:

This paper outlines emerging findings from the research on how partnerships, management and service delivery arrangements work best to support long term behaviour change. In particular it focuses on the partnership approach to management and delivery that has been applied across the MA projects.

A partnership development journey has been experienced at both national and local levels. The clearer the aims and objectives at the outset, the easier it is to attract the right people and partners to support the project and contribute the appropriate expertise during its lifetime. Internal and external influences need to be considered and planned for during set up, delivery and sustainability phases of the project.

The evidence on which this briefing paper is based

Over the past four years the MA programme has been supporting and monitoring 14 projects across Wales providing practical support to a range of sedentary groups (e.g. the over 50s, young single mothers, people with physical disabilities or with mental health problems, carers, young people, people from Black and Minority Ethnic communities). These projects emerged from an experimental local

¹ Minister for Heritage and Minister for Health and Social Services: Creating an Active Wales December 2009

² Part of the Big Lottery's UK-wide Community Sports Initiative, although MA focuses on physical activity opportunities as well as sport

partnership-forming process described below whose first task was to identify potential participants in selected localities around Wales for whom tailor-made outreach and support projects could be designed and delivered to change their lifestyles.

The experiences described in this paper have been distilled from the carefully recorded experiences of these projects as they first made contact with their target participants, began to understand their needs, gave them their first taste of physical activity, helped them establish a regular pattern of activity and then supported their transition towards sustainable active lifestyles independent of the projects. Each project has adopted an experimental approach, testing what seems to work through observation and dialogue with participants using action research. This has helped successful practical strategies to be honed through user feedback.

Partnership working has been a fundamental element of all the projects, and of the programme as a whole. Given the pioneering nature of a programme focused on 'hard-to-reach' and 'hard-to-engage' sedentary people, one of the key challenges has been to forge many completely new partnership structures and to make them work practically and strategically. Not surprisingly this has proved to be a dynamic, complex and sometimes turbulent experience, but while a few of the partnerships have struggled at times, most have developed into effective mechanisms for sharing expertise and resources, and many may endure and evolve as MA reaches its sustainability phase.

An experiment in partnership formation

The MA programme is the Wales element of a UK-wide programme funded by the Big Lottery Fund (BLF) called the Community Sport Initiative (CSI) which aims "to increase physical activity amongst people who experience barriers to participation." The CSI has been developed differently in each country and as the name suggests it has focused on engaging marginalised groups in formally run sports activities. In Wales however a decision was made early on in the development of the programme to focus on encouraging general 'physical activity' rather than involvement in 'sports', probably as a result of the emphasis being placed by the Welsh Assembly Government on improving the population's physical activity levels to improve standards of health.

MA was conceived as an experimental and innovative learning programme by the BLF in Wales, and this was also reflected in the unusual way in which it was brought into existence. The first stage involved procuring a suitable National Partnership to manage and guide the programme, and in 2005 it appointed a partnership led by the Sports Council for Wales (now Sport Wales) which brought it together with the National Public Health Service for Wales (now Public Health Wales), the Countryside Council for Wales, the Wales Council for Voluntary Action and the Welsh Local Government Association.

At the same time the BLF published "MA Stage Two Guidance Notes" setting out the detailed terms of the programme which included its focus on sedentary populations, use of the natural outdoors environment as the setting for appropriate physical activities, and its emphasis on evaluation and learning. The National Partnership was charged with the task of selecting specific types of sedentary population in a range of different localities around Wales who could be helped to change their lifestyles through tailor-made physical activity projects. The next step was to invite appropriate public and third sector organisations in each locality to meet with the National Partnership to explore how a project could be designed for the selected target group(s), as well as the varied kinds of partnership structures needed to take the project forward.

Over a year was spent carefully facilitating this partnership-forming, project-designing aspect of the programme. There were inevitably some tensions between the National Partnership's 'top-down'

selection of target groups and the perceived 'bottom-up' priorities of the emerging local partnerships, although in most cases the selection was accepted and often welcomed. While there was limited flexibility on this point, the National Partnership and the BLF were prepared to invest time and resources in assisting the complex process of partnership formation in order to draw on vital local knowledge and expertise in the design of the projects and the working arrangements needed to manage them as collaboratively as possible.

Some of the eventual partner representatives involved in these negotiations recall them as rather confused and uncertain at times. In some cases the MA programme criteria were quickly accepted, whereas in others they were challenged. Sometimes an acceptable lead partner was quickly identified around which a group of appropriate supporting partners willingly coalesced, while in others there were tensions and rivalries that both slowed the process and influenced the final make-up of the partnership itself. In one or two cases the National Partnership had to become proactive in securing either the partnership or the terms of the proposed project or both. Eventually however, each partnership through its 'lead organisation' submitted a project proposal to the BLF which with varying degrees of amendment was accepted. One of the consequences of this elongated process was the staggered commencement of projects across a 12 month period (mid 2006 to mid 2007).

During this process both the National Partnership and the BLF saw their roles as guiding and facilitating the local discussions and negotiations around each proposed project. To help suitable partnerships form, the National Partnership invited a wide range of organisations with an interest in health, the natural environment, community development or regeneration, or the needs of specific sedentary groups to join a Strategic Advisory Group. Each organisation provided information on its role, how it envisaged being able to contribute to the local projects, and the kind of projects it would like to become involved with. This and other sources of guidance were posted on a dedicated MA website which was intended to become a key resource as the programme progressed.

Recollections of this critical early stage of MA often describe a jostling for position, sometimes amicable, sometimes less so, as organisations tried to ensure they received some direct benefits (for themselves, their aims and/or their client groups) from the way the different projects were structured and managed. To some degree this could be characterised as a 'natural' or 'dynamic' filtering process in which the most appropriate and committed partner organisations emerged in response to the local project's criteria, whilst other organisations less relevant and committed fell away. Whilst this is probably true in many cases, there is also evidence that the resulting tensions prejudiced the involvement of a few organisations which otherwise appeared well placed to make a valuable contribution to the programme.

Initial perceptions of partnerships

Not surprisingly, the partnership-forming and project-design phase described above tended to influence the initial perceptions of the way the MA programme would work. The arrangement for funding the individual projects appears to have been of particular significance since this has involved a direct contractual and therefore compliance relationship between project 'lead organisations' and the BLF. This has meant that while the National Partnership has been contracted by the BLF to deliver the overall programme objectives (especially its evaluation and learning aspects), it stands outside the contractual relationship between the lead organisations and the BLF.

As a consequence many project partnerships (hereafter referred to as 'steering groups') perceived their reporting relationship with the BLF as paramount. Since ambitious targets and outputs have customarily been attached to grants from the BLF and other key funders, many assumed this would

naturally be the case for MA. Some steering groups therefore assumed the task was to reach and benefit large numbers of people in the selected target group(s), to achieve this reasonably rapidly, and thus be able to report a healthy spending-profile which would eventually illustrate an efficient cost/benefit ratio.

This approach was not however particularly conducive to the experimental learning strategy at the heart of the programme. This required an emphasis to be placed on quality and detail rather than quantity and throughput, so that accurate and quite subtle information (both quantitative and qualitative) could be gathered on the impact of project activities on beneficiary behaviour-change. Many project staff consequently perceived some tension between the direction of the programme and the direction and priorities of their employing lead organisation, often supported and reinforced by the views of other steering group members. The non-contractual position of the National Partnership made it more difficult to counteract these influences.

In practice these initial concerns about achieving numbers and outputs were outweighed by the challenges facing project staff when trying to identify, reach and involve genuinely marginalised sedentary individuals who often proved hard to engage. Many staff have stressed the time it took them to develop the relationships and build the confidence needed to bring people from the target groups into contact with specially designed activities. Even where lead organisations misunderstood the programme's learning focus, the secure funding arrangements over four years and the lack of pressure for immediate results from the BLF and the National Partnership allowed staff to take their time in these critical early stages.

The influence of central support

Although it may have seemed to some, at least initially, that MA was little more than a suite of projects spread across Wales doing roughly the same thing, it was the National Partnership's role to weld them into a national learning programme that had the potential to influence future policy and practice. As the first tranche of lead organisations began to recruit staff and structure their projects there was a lot of activity at the centre of the programme. A programme manager was recruited by the national lead partner (Sport Wales) and the manager took the first steps in building a 'central support team' (CST). As well as maintaining day-to-day contacts with project managers and newly appointed project coordinators, the manager wrote, commissioned and distributed a variety of guidance materials. At the same time, with the help of others, the manager introduced a set of reporting systems and forms aimed at tracking the operational performance of projects and capturing the quantitative and qualitative information needed for evaluation purposes.

Right from the outset the CST was determined to provide a support service that would be valued by local staff and that would consequently encourage them to see their projects as part of an overall national programme dedicated to testing and learning what works in achieving physical activity behaviour change in sedentary groups using the outdoor environment. This involved a personalised induction scheme and a problem-solving service designed to help local staff gain a clear understanding of the innovative nature of MA and to guide them in possible ways of identifying, contacting and engaging the different target sedentary groups in appropriate forms of physical activity.

Consultants experienced in action research were also contracted to prepare detailed practical guidance on action research techniques. These consultants, who have become part of the CST, have also provided one-to-one tuition and support to help project staff use these techniques with their target groups. In addition, three 'evaluation seminars' have been held each year to enable project and CST

staff to get together to review their experiences, learn new techniques, and gain confidence in using them to record and utilise the valuable information they have generated. This regular contact between local project staff and the CST has enabled them to feel part of a wider exercise with a strategic purpose. Not only has the CST produced guidance material, designed and populated an interactive website through which information can be exchanged, organised regular seminars and regional meetings for project staff, it has also provided bespoke support for project evaluation events and other activities. Without this support many project staff have said they would have been pulled in contrary directions by their lead organisations and steering groups.

Whilst this centralised support service focused primarily on guiding and supporting project staff, it has become clear in retrospect that less attention was initially paid to guiding and influencing the lead organisations and steering groups. One way this was achieved was by including regional officers of National Partnership members (especially from Sport Wales and the Countryside Council for Wales) on project steering groups. The programme manager and the CST have also tried to attend as many steering group meetings as possible to explain MA's learning objectives.

Balancing strategic and operational priorities

The initial process of partnership-formation and project-design tended to focus attention on strategic issues such as the need to bring key organisations together, to explore linkages between project objectives and the interests of steering group members, and to set key parameters and processes. This 'set-up' phase continued in most instances for the first year, but a pattern that can be traced across several projects as they got underway is a subsequent shift away from strategic towards operational considerations. As this happened many project workers reported that their steering group seemed uncertain about its role and often tended to be a passive recipient of routine operational information rather than a more proactive 'critical friend' and supporter. Further reflection suggests that when a partner organisation sees clear practical benefits from its involvement in a project, its commitment is naturally stronger. However the time it often took many project staff to get to know their target groups and to build working relationships before starting to design their activities meant that such benefits could remain obscure for a considerable time. This may be a reason why partner attendance at several steering group meetings was patchy.

This shift from strategic to operational issues also resulted in a gradual change of personnel attending steering group meetings, and this tended to change the character of meetings. Some steering groups decided to hold on to their strategic role and to form 'operational groups' to enable those most closely involved in practical day-to-day issues to get together to deal with them with project staff. Where this approach has been adopted the steering groups have tended to meet less frequently (sometimes only annually) whilst operational groups have enabled new partners and key individuals (e.g. activity providers, community representatives and volunteers) to get involved in practical discussions about activity design and delivery issues. In a few cases, however, the steering group has morphed into an operational group which can make it less able to make higher level strategic links as the project starts to reach its sustainability phase.

For obvious reasons project staff have usually welcomed the shift towards operational issues, and many have appreciated the practical support which their operational groups have facilitated. It has been easier for them to see the purpose of an operational rather than a steering group, although that is now beginning to change as the end of the programme gets nearer. Whether or not an operational group has been overtly created, experience has shown that project partnerships need to be dynamic and flexible so that they can adjust their representation and working arrangements at different phases of

the project cycle. This can be done reasonably smoothly without completely losing a strategic overview, or the process can be rough-edged and uncomfortable. Much has seemed to depend on the way the groups have been perceived by project managers in the lead organisations and whether they are given status and appropriate attention. This experience has varied across the projects.

Project management experiences

Within the lead organisations the experience of line-management support for project staff has varied. As is so often the case, where senior management recognised the strategic importance of the MA programme, especially its experimental approach learning focus, the greater the influence appears to be having on the shape of future services for sedentary populations. Two good examples are the Swansea carers' project and the Merthyr Tydfil and Blaenau Gwent mental health project. In a few instances however, poor understanding often arising from a change of management personnel during a project's early phases has resulted in staff feeling unsupported and isolated.

Where management support has been weak, staff sometimes managed to become involved in other strategic partnership structures serving their locality with agendas that make valuable connections with what MA is trying to achieve. These have often been productive sources of support and have raised awareness of the 'MA approach' with potential future partners, especially where there is a shared interest in improving the health status of sedentary populations.

In terms of any noticeable differences between the management approach of statutory and voluntary organisations, there is some evidence that voluntary bodies have tended to recognise the long term value of their projects more quickly because they often form a significant element of their overall capacity. On the other hand, because these bodies do not always have particularly close working relationships with the statutory sector the prospects for mainstreaming MA's participant-led approach through relevant statutory services appears to be greater when it is enthusiastically backed by senior managers in local authority lead organisations. Nevertheless those voluntary bodies acting as lead organisations that can see MA's long term potential seem keen to sustain its activities and are actively seeking new sources of funding.

Internal and external change

Another powerful influence on the direction and impact of local projects has been the ebb and flow of corporate change within lead organisations. In one or two cases in both the statutory and voluntary sectors the scale of this internal change was profound. Such powerful dynamics can have a destabilising effect on operational delivery especially during the early implementation phase, and can lead to a loss of staff confidence. This may turn out to be irrecoverable, but in many instances after an unsettled and confused period in a few MA projects a more supportive regime has emerged.

In more than one project the level of management commitment was ultimately strengthened via restructuring, although the original staff had moved on by then and many loose ends had to be reconnected. As a project worker explained, one of his local authorities restructured and the other transferred line management authority to a head of service, allowing links to be made with both national and local authority policies. As a consequence MA became

“...more strategically considered as a project and is now considered 'best practice' – not just a complementary programme.”

Similar dynamics of change taking place externally can also have an impact. Many staff reported valuable partnership relationships weakening after key personal left their posts, and adjustments inevitably had to be made. In one case a strategic review across a cluster of services highly relevant to a local MA project distracted potential partners (including steering group members) from making links with MA and useful opportunities were lost or delayed.

Making links and 'mainstreaming'

One aspect that is likely to influence the potential for mainstreaming 'the MA approach' is the degree to which partnerships have succeeded in establishing links between their project and the work or roles of other statutory and voluntary sector organisations or service agendas with the potential to generate synergy. Building relationships and confidence between key individuals and departments both within and between the sectors is usually a critical precursor to mainstreaming innovative practice and partnership working. Sometimes non-MA partnerships have been identified as having complementary agendas and these have allowed links to be made between a project's pioneering work to improve the health and well being of sedentary groups and other strategic objectives. Such connections and wider strategic recognition are obviously critically important and need to be highlighted during MA's dissemination phase.

A partnership's role in targeting

Experience has shown that projects aimed at a well-defined group of beneficiaries (e.g. young mothers, carers, BME, mental health) have found it easier to identify relevant partners, concentrate resources and develop the necessary expertise than those aimed at a less well-defined target group (e.g. disadvantaged individuals and groups, people on low incomes) and/or projects that have tried to spread their limited resources over a large area, such as across two county boroughs.

One of the challenges when trying to construct an appropriate project partnership is the temptation to stretch key parameters such as the targeting of beneficiaries to meet the interests of a range of potential partners. Discussions within MA to date indicate that it would be better to start with small group of partners who can agree on a well-focused project plan because it is usually possible to broaden the agenda (and the partnership) at a later date when experience has been gained.

The impact of four-year funding

Feedback from project managers has highlighted the advantages that accrue from having secure funding over a four-year period. Experience has shown that sedentary people are not only 'hard to reach', they are also 'hard to engage' as a consequence of the many practical and psychological barriers they face when being brought into contact with opportunities for physical activity that have formed no previous part of their lifestyle. One of the many lessons learnt through designing services for sedentary people has been the great value of allowing time (a) to gain an understanding of their particular needs and interests, and (b) to enable them to gain the confidence and sense of security they need to take the critical first steps. Rushing this process risks the creation of inappropriate services and putting people off from any engagement in future.

Secure MA funding has allowed lead organisations and partnerships to learn what works through trial and error, and the use of action research has enabled a continuous flow of feedback from participants

that has shaped and improved the support services being offered. When asked to sum up the benefits of a longer than usual funding timeframe, the following points were made:

- increasing an individual's self-esteem and changing their long term behaviour takes time;
- a longer intervention period increases the chances of achieving a greater 'legacy' of outcomes;
- it improves an activity's transition to sustainability when the grant ends;
- building effective relationships and genuine culture-change takes time;
- building a sustainable partnership infrastructure takes time;
- capacity-building takes time – with both existing and new groups;
- generating motivation and stimulating initial participation needs time;
- a longer project period allows the time to make mistakes and to learn;
- it offers the chance to identify and achieve realistic outcomes;
- it provides the opportunity to debate issues and reach a common view;
- it allows the time to achieve 'buy-in' from key partners and participants.

Partnerships, dissemination and sustainability

The MA programme is now entering its dissemination and sustainability phase. Preparations for this phase were begun by the National Partnership in 2009 and have involved holding a special lead organisations' seminar and supporting local project staff and steering groups with the preparation of 'exit (sustainability) strategies' which as well as helping useful activities to continue also identifies opportunities to disseminate the learning to partners and to 'mainstream' MA's participant-led approach.

For some projects the long term sustainability of activities and the expertise and capacity that support them has been a conscious objective from the start and this has influenced the way that engagement with participants has been developed. For others the requirement to consider sustainability 18 months prior to their grant ending has generally been welcomed. In most cases it has made both lead and supporting partners more aware of the value of MA activities and the need to plan how they might be continued / developed / adapted in future. Even where lead organisations appear rather ambivalent, project participants (especially volunteers) are being given an opportunity to think and plan for sustainability.

In some cases, particularly the local authority-led projects, links are being explored with other (often statutory) services such as health and social services. As one project worker has put it:

“The initial focus was on physical activity – now there is a more holistic approach [to supporting participants which] means a better chance of success... the budgets for physical activity in the local authority are at risk with the need to streamline resources. There is a need to make links and show the impact the project can have on other things. Senior involvement is necessary to make this happen.”

In many voluntary sector led projects work is underway to identify alternative sources of funding, often utilising the proven partnership arrangements that have been developed. A case is being made for continued voluntary sector involvement to improve the health and well being of marginalised groups which includes stressing the sector's efficiency, the goodwill it often enjoys, its ability to recruit and support volunteers, its credibility and specialist expertise, and its ability to personalise support to meet an individual's needs.

Some of the projects have already begun to change the way they work, with one now balancing its directly provided services with bespoke training and awareness raising courses to enable partner organisations develop their own activities for sedentary groups using the 'MA formula' and local outdoors environments. Experience has also enabled some projects to 'package' their activities with certain groups (e.g. those with mental health issues) so that a proven programme can be used / adapted / or in effect 'franchised' to others. In other cases 'spin off' projects have been created which can be continued if formal groups are constituted and further funding is obtained.

Lessons learnt:

- a programme that tries to combine the 'top-down' setting of certain project parameters with a 'bottom-up' responsiveness to local conditions and priorities will need to carefully manage the tensions that are likely to arise and should build in a degree of flexibility;
- constructing new project partnerships can be a complex and sensitive process as potential members jostle for position and negotiate an acceptable lead organisation – although this often allows the most appropriate and committed organisations to emerge while others fall away, it can also prejudice the involvement of some that could make a valuable contribution;
- funding and contractual relationships need to be carefully designed to ensure they reinforce a programme's core objectives because they can have a significant bearing on the perceptions and motivations of grant recipients, strengthen or weaken other important relationships;
- if a cluster of local projects is to be run as a coherent programme, sufficient capacity and expertise is required at the centre of the programme to guide and support projects, and to give both workers and those supporting them as managers or partners a clear sense of strategic direction;
- it is not unusual for the focus of projects within a broader programme to shift from initial strategic concerns to more day-to-day operational issues as they get underway (although strategic thinking is likely to return to the fore when sustainability is being considered) – therefore project partnerships need to be dynamic and flexible so that they can adjust their representation and/or working arrangements at different phases of the project cycle;
- where senior management recognises the strategic importance of an innovative or experimental project there is a greater likelihood that the knowledge generated will be used to influence the shape of future services;
- voluntary bodies appear more likely to recognise the long term value of their projects because they often form a significant element of their overall capacity, however the prospects for mainstreaming an innovative project appears to be greater when it is enthusiastically backed by senior statutory authority managers;
- project managers and steering groups need to be alive to the destabilising influences of internal or external change and try to mitigate or adjust to them so that the project remains on course;

- a key role for partnerships and steering groups is to make links between their project and the work or roles of other statutory and voluntary sector organisations or service agendas with the potential to generate synergy, since this is often a critical precursor to mainstreaming innovative practice and partnership working;
- projects aimed at a well-defined group of beneficiaries have found it easier to identify relevant partners, concentrate resources and develop the necessary expertise than those aimed at a less well-defined target group;
- secure long-term funding has proved vital when trying to change the behaviour of hard-to-engage sedentary people because it takes time to overcome the barriers they face, as well as to build the essential partnership relationships needed to deliver an effective service;
- thinking about sustainability well in advance of a stream of funding ending helps both lead organisations and supporting partners to become more aware of a project's real value and of the need to plan how it might be continued / developed / adapted in future.

Conclusion: what is the paper telling project developers, funders and policy makers to do?

- Nationally coordinated programmes based on a group of projects need sufficient expertise at the centre to provide advice, guidance and support to lead organisations, local partnerships and local staff throughout the time of their projects.
- Partnerships and organisations need to be clear about the role of any groups that it establishes to guide the strategic and operational elements of projects. Group members need expertise that allows these groups to be flexible over time as the priorities change.
- Providing clear aims and objectives at the outset is important in the development of any new partnership or project to ensure that the right people and organisations are brought to the table and remain committed throughout its' lifetime.
- Ensuring the engagement of senior management can enable the project to become part of the day to day business and secure the long term future in achieving its outcomes.
- Providing long term funding allows more effective project design and implementation as well as allowing time to embed the structures in an organisations daily business and the opportunity to secure sustainability funding.

Future Research:

MA has now engaged with over 9,000 participants who have been given the opportunity to become active using the outdoors and natural environment. Feedback from participants on the benefits of being active outdoors – and the barriers they face – will continue to be gathered through the research. This will allow the programme to develop further and increase learning on how to encourage more sedentary people to access the outdoor environment in Wales to sustain a physically active lifestyle.

Further information:

The MA website contains information about the National Partnership and all local projects as well as annual reports, research papers, practitioner guides, case studies and guidance notes issued to project staff. www.mentroallan.co.uk