Learning paper:

Role of the lead partner in Bristol's Golden Key programme 2014-2022

June 2022

Introduction

Second Step is the lead partner for the Golden Key programme in Bristol, one of twelve programmes funded by the National Lottery Community Fund as part of the Fulfilling Lives programme between 2014 and 2022.

Golden Key has successfully led change to services and systems for people facing multiple disadvantage across Bristol over the last eight years and in recent months the city has confirmed investment from the Changing Futures programme for the next three years.

Tackling multiple disadvantage (and a range of other complex social policy challenges) requires a system-wide approach which in turn relies on strong local partnerships. However for practical, financial and legal reasons, many programmes also require a 'lead partner' to hold the funding and contract and to drive the work locally. This role of 'lead partner' was undertaken by Second Step during the eight-year period of Fulfilling Lives in Bristol.

Second Step has commissioned a small piece of research to explore the unique experience of being lead partner for Golden Key, the learning that has emerged from this for the organisation and wider partners, and the lessons that can be transferred to future partnership programmes, including Changing Futures.

The research was based around two facilitated discussions – one with key staff at Second Step/Golden Key and another with partners closely connected to the work. These explored the motivation for bidding to be lead partner, the early experiences of the programme, the successes and challenges over the last eight years, the role of governance and wider relationships, and the learning that is emerging for future partnership programmes.

From these discussions we have **identified a set of ten 'criteria for success'** which attendees felt were important not just for the success of Golden Key, but which also had impact, relevance and transferability for future partnership programmes. We present these below, alongside some context for each.

As future partnership programmes emerge and develop (including Changing Futures) we hope that the learning in this paper supports organisations to succeed in the role of lead partner and to avoid common pitfalls and challenges.

This document is intended as a contribution to an ongoing debate and we welcome input and feedback.

Ten criteria for success

Given traditional finance, legal and accountability structures, the role of 'lead partner' is almost inevitable in any major funding programme. While having a lead partner may not be ideal for driving systemic change, from a practical perspective it is often necessary and the role can be undertaken in a way that encourages systemic leadership and change.

From our conversations with staff and partners in Bristol, there emerged ten themes/criteria that lead partners in any programme should consider if they wish to be successful in the role.

1. Selecting a lead partner

Selecting a lead partner can be a challenging process fraught with politics, tensions and the need to balance local relationships that oscillate between collaboration and competition. However, it can also be a very rewarding process and one which shows funders whether local areas have the commitment and capability to develop partnership structures that can drive systemic change. Our conversation highlighted the need for local areas to:

- Ensure **independent facilitation of the selection process** by an agency that does not want to be lead partner. The process in Bristol was led by Voscur, the voluntary sector infrastructure body.
- Ensure a process to enable the lead agency to be **selected by its peers**, thereby building trust and confidence from the start.
- Select an agency that has a **strong track record of local partnership working and a firm understanding of the local context.** There was some discussion about the value of national/external agencies as lead partners, but on balance it was felt that agencies with local knowledge and context were better placed.
- Ensure that the lead agency has **the capacity to lead**, both in terms of organisational resource and strong local relationships.
- Ensure that the lead agency is **representative of the local population,** has a strong understanding of equity, diversity and inclusion and understands the range of ways that individuals experience the problem the programme is trying to solve.
- Keep in mind the **different roles that statutory and voluntary agencies** can play as lead partners and the incentives and disincentives for partnership that come with each choice. Local areas need to recognise how this choice will impact the formation of partnerships and put in place plans to mitigate risks from the beginning.

2. Governance – independent chair

Our conversations highlighted the role of programme governance as equally important to the selection of the lead agency and also the key role that the lead agency has to play in ensuring that the most appropriate governance structures are in place.

In particular it was felt important for lead agencies to ensure that the work is not regarded as a "project" or "service" of their own, and that partners instead engage with it as a jointly-owned systems change programme. The conversations suggested that:

- The role of **governance is vitally important** and something that the lead agency needs to get right from the start.
- There was significant value in having an **independent chair** as this prevents the programme from being too closely associated with the lead partner or being seen as a project or service. Second Step had recognised the need for an independent chair early and had been key to getting this in place.
- The **autonomy and independence** of the chair was seen as very important – the Golden Key chair in Bristol had not known anyone in the system when he started the role and this was beneficial for the positioning of the work and not being seen by any partner to have an agenda. An open recruitment process and a focus on relational management skills rather than subject knowledge had contributed to this.
- The lead partner plays a vital role in ensuring that these governance structures are in place. This requires an initial leader from the lead partner with good **relationships and positioning** to get the structures in place before then stepping back for the independent chair.

3. Governance – role of the board

Alongside the independent chair, there is a need for a clear governance structure to drive the work of any local partnership. Many Fulfilling Lives areas – including Bristol – put in place a programme board to fulfil this role. Our conversations suggested that lead partners need to ensure that:

- There is a clear understanding from all involved of the **difference between "partnership governance" and "organisational governance".** In organisational governance, board members are responsible for the running of an organisation or charity. In partnership governance, members are required to have a twin responsibility – responsibility for the programme (to some agreed extent) and a responsibility to create change within the organisation they represent and the wider system (a systems responsibility). A clear terms of reference is needed to create this twin responsibility, as well as accountability structures at the board and within members' organisations (see below).
- There is **clarity on the division of responsibility between the partnership board and the board of the lead agency.** This includes clarity on which board is taking key decisions on risk, outcomes tracking, financial effectiveness, resourcing choices, etc.
- The board of the lead partner has put in place **clear processes for managing the risk associated with the delegation of any of the above functions** to a partnership board.
- The partnership board has taken clear steps to **ensure it has a diverse membership** which reflects the local population.
- There are **structures in place around the 'systems responsibility' role of partnership board members**, both within the board itself and within the board

members' employing organisations. Lead partners need to ensure that board members understand their role in helping to drive systems leadership and system-wide change and that they are held accountable for this at the board and within their own organisations.

4. The importance of lived experience

Lived experience is a vital aspect of programme governance and delivery. The conversations noted that:

- The lead partner has an important role in **promoting the involvement of people with lived experience** in all aspects of the programme's governance, delivery and evaluation.
- Creating the right **structures to enable the involvement of people with lived experience** is vital, and the success of Independent Futures (IF) in Bristol was noted as a particular success of the programme.
- Promoting **good practice around coproduction** across the system is an important part of any programme, as is challenging bad practice.

5. Shaping narrative and purpose: Delivery versus systems change

Our conversations explored in some detail the role of the lead partner in shaping the programme of work. In many cases this was an iterative process, rather than being clear from the bid stage, and the lead partner in Bristol played an important role in shaping this in the early stages of the programme. The conversations noted that:

- There is a constant tension, which can be both positive and negative, between **running a delivery programme and running a systems change programme.** Delivering frontline work (such as navigators) can show the system how to be different and create helpful evidence and data, but it can also risk the programme being seen as "a service" and remove incentives for systemic change from other partners. Conversely, trying to lead systems change without clear practical examples of how things could be different can be challenging. The lead partner has a key role in getting this balance right for the programme and encouraging others to engage in a discussion around this that can build consensus. It was felt that the frontline work led by Golden Key was a necessary pre-requisite for the systems change work, but that the process of finding the balance on this was a learning process.
- Developing a **clear narrative for the approach the programme plans to take between delivery and systems change is vital.** The conversations explored the evolution of the Golden Key work, describing it as feeling quite natural, but there wasn't always a clear or agreed narrative expressed for the connection between the frontline work and the systems change work. It was felt that a clearer narrative could have been communicated from the beginning of the programme, while also recognising that the work is by nature iterative. A clear narrative was also important for setting the evaluation and learning priorities of the programme.
- Lead partners need to ensure that their **staffing, resourcing and management arrangements match the balance they have chosen between delivery and**

systems change. In Bristol the team recognised they needed to adapt the staffing structure to create more resource for systems change work.

- Lead partners need to give themselves **regular time for reflection and iteration** to support the development of the programme. External support may be a useful way of achieving this.
- The lead partner has an important role to play in **communicating the agreed narrative.** This requires a strong communications function that is well resourced. Attendees reflected that in Bristol the Golden Key website was the most visible expression of this, and it was recognised as an important resource for sharing learning. The annual Golden Key awards were also important in bringing stakeholders together, recognising and celebrating the development of good practice and systems change.

6. Supporting the process of systems change

Once the programme has clarity on the balance between delivery and systems change there is an important role for the lead partner in supporting the process of systems change across the locality. The conversations noted that:

- The lead partner has an important role in helping to **operationalise the concept of systems change, upskilling partners and providing the expertise and trusted spaces for this to take place.** In Bristol, the lead partner recognised early that a significant investment was needed in support for systems change across the city and external resource was brought in to support learning, development, action and reflection.
- The process of systems change will evolve over the life of the programme and the lead partner must be ready to **lead the local area to the next stage of the systems change journey.** In Bristol this included iterating the approach to systems change over the years, from blocks and barriers work, to the Creative Solutions Board and other initiatives designed to focus minds on the challenges.
- Achieving systems change requires **a focus and prioritisation on a set of key issues**, as the system is too big to change wholesale. Some attendees reflected that the priorities in Bristol may at times have been too broad. The lead partner has an important role in helping the local area to choose these priorities, to ensure a clear understanding and ownership of them across all levels of the partnership and to keep the partnership focused on the topics that have been agreed.

7. Evaluating impact

Measuring and evaluating impact is an important part of the role of lead partner. It was noted from the discussions that:

- The lead partner plays an important role in shaping the evaluation of the programme. Significant work was needed in Bristol to scope and agree an approach to **defining, measuring and evaluating systems change** and this work was prioritised at the beginning of the programme. The positive relationship with UWE was highlighted as particularly important in this respect.

- The lead partner also has a role in ensuring that learning from the evaluation **helps to shape the programme throughout its implementation** and not just at the end.

8. Building and maintaining relationships

As would be expected for a systems change programme, relationships are key. The conversations noted that:

- The lead partner has a key role to play in **building, maintaining and role-modelling the relationships needed across the local area** to deliver a successful systems change programme.
- There has been **continuity in many key roles** and this has been important for the programme and for local relationships. However, it was also noted that systems can benefit from change and that a key role for the lead partner is to maintain relationships as people and organisations change over the years. It was felt that there was more turnover in the statutory sector than the voluntary sector over the period of the programme and that relationships with statutory partners therefore sometimes struggled as a result.
- If organisations have **'skin in the game' and it is clear how they are accountable** for the change the programme is trying to make, then they are more likely to be properly and sustainably involved (link to governance points, above).
- There was a need for lead partners to **create challenge but avoid confrontation with partners across the system**, tempering ambition to bring others on the systems change journey. It was felt that lead partners can't be seen to be 'throwing out the old' but that they do need to be ambitious.

9. Equity, diversity and inclusion

Systems change is not possible without a clear focus on equity, diversity and inclusion. The conversations noted that:

- There is a vital role for the lead partner in taking a **leadership role around equity, diversity and inclusion.** This needs to be at the heart of system change ambitions and activity.
- The representativeness of the people and organisations involved is highly relevant – it will **not be possible to identify blocks and barriers for some groups** if their experience of the issue the programme is tackling is not well understood. The conversations highlighted the experience of minoritised communities, young people and those involved in the criminal justice system as important within the future Bristol work.

10. The role of funding

The conversations touched on the role of funding in enabling lead partners to lead in the way that is needed to drive change. It was noted that:

- Money from **external sources (to statutory or voluntary agencies) can cause disincentives for systems change across the local system**. This needs to be recognised from the beginning and actions put in place to mitigate the risk. Failing to consider the impact of this early can have negative effects on the programme (this links to the point above about the choice of statutory/voluntary lead partner and the impact on partnership formation).
- The ability of the National Lottery Community Fund **to fund a systems change programme rather than a delivery programme** had been vital to success. The flexibility and courage of TNLCF and their focus on learning and iteration had been key components of success, as had the relationship between funding managers and lead partners.
- Particularly at the beginning of the programme there is a need for funders and lead partners to **avoid a focus on numbers, throughput and output** and instead to focus on the development of systemic change and the ways in which this can be measured.
- Lead partners need to play a key role in **feeding back to the funder about any funding/assessment barriers that are preventing a systems change focus** and being flexible themselves in how the programme is developed and reported. It was noted that it took some time at the beginning of the programme for these relationships between the Lottery and the lead partners to form and become effective.

Conclusion

We hope that the themes emerging from these conversations are of value to organisations delivering (or considering) lead partner roles in future programmes.

We welcome feedback and reflection on any of the issues raised or any points of omission.