

## Lloyds Bank Foundation: People and Communities, Three Years In webinar transcript

**JILL BAKER:** Okay, people are still joining but I think we make a start, as it just coming up to 14:05. So, welcome everybody I'm Jill, I'm the Director of Communities here at Lloyds Bank Foundation and I'm your host for today.

We are 3 years into this work, working in with people in communities and we're here to share and discuss with you all some of what we've learned.

Before we get started, I've just got some housekeeping to go through. The session is being recorded and it will be uploaded onto our YouTube channel afterwards so that people who couldn't come today can watch it later.

We also have joining us today Nick and Hayley who are our British sign language interpreters and you will see them on screen through the panel discussion and in the presentations as well.

We are looking forward to hearing from you, we are learning. So, this is about what you're telling us too and we're committed to doing that in a really safe way, so we just ask you, you know, there's as many different viewpoints, as there are people attending so just be respectful and engaged with others with kindness.

And we're going to have a Q&A as part of our panel discussion. If you want to ask a question, you can use the Q&A function which is down. On the lower right-hand side of your screen.

And we hope to answer lots of your questions, but we're also doing breakout rooms. So, if you don't get your question answered in the panel session, I'm sure you can pick it up in your in your breakout room when we get there.

Okay, so I'm just going to kick off, by taking you through a little bit of our story.

A little bit about our work and why we're doing what we're doing. Okay, so, I have to do a Chris Witty now, next slide please.

So why are we doing this? and we're gonna start with why, why are we doing this? Next slide please.

So I think everybody can would agree that we are facing multiple crises. We were facing crises before Covid. We'd have many years of austerity, we'd had Brexit and then the impact on the fallout of Brexit.

Then came COVID, the national lockdowns, the difficulties that put us all into. And since then, we've obviously had the escalating cost of living.

We've had social security reform, which has not gone well for many people. And world events which are still going on and all of these things have kind of come together.

Next slide, please.

At the same time. We know that demand for services is going up in our communities and the issues that people face are getting more complex. There is less money in the public sector and we know that we've had some local authorities that have already declared bankruptcy.

And we also have our research that shows that essential services for people who have needs are actually best provided at community level.

They have both a connection with people and also can prevent escalation into higher end services. But those community-level organisations are often hand to mouth, often lacking a good income diversification strategy maybe because they haven't got time to do one but we also know that commissioning can often favour larger organizations.

Sometimes because it's easier, it's easier for commissioners to engage with one larger body rather than lots of small ones. So for lots of reasons the services that are out there delivering are facing increased pressure. Next slide, please.

So this kind of diagram shows you that what we were trying to do was develop some thinking and some work that's in that little yellow bit in the middle.

So that people get the support they need when they need it. In a way that works best for them, against that context of increasing demand and complexity. And reducing budgets. Next slide, please.

Now the obvious thing for a fund to do is to fund some stuff, but actually when you look at this slide and when you're as old as I am, you can remember the community development projects of the seventies.

These are just some of the funding programs. From government, never mind from many of the trust and foundations. That have seen money flow into communities. But they all, despite some of them being really big, or short term.

Short lived impact usually. Delivery in quite siloed ways it's money for this or it's money for this and actually in and of themselves a quite small scale. So, despite all this money flowing in we haven't seen it ever create. The step change that we might want to see for communities. Next slide please.

So, we felt that we needed to try something different, and we are trying to work out if there is a new way. To design, to deliver and to resource services for people facing complex challenges in their lives. Next slide, please.

So that's why we're doing this, but why are we? Why are we in Lloyds Bank Foundation? doing this work. Next slide please.

This is our vision and our mission, in our current strategy. We're wanting to really partner with small and local charities and organisations, the people in them and the communities they serve. To work towards a more just and compassionate society for everybody. Where people who do face those difficulties get the opportunity to thrive. Next slide, please.

So why small and what is small? So, in the context of most of our work, small is under a million under £500,000 for our grant programs.

We primarily fund small organizations under £500,000. And the reason that we do that to do that is that because we commissioned some research that clearly showed that small organizations based in their communities provide this very distinctive offer that they have a very distinctive approach, and they are positioned uniquely.

So, the what they do provides a very safe space. They promote inclusion, they deal with people as they find them, their person centred, they don't have complex referral pathways, they usually don't have waiting lists. People come turn up at the door and they will get responded to. Often turning up at their door long before they turn up at the door of statutory services.

So, they create local networks between themselves and for local people and a lot of their work is very relational. They're the kind of glue that holds communities together. And that means, that they bring more than the sum of their parts. Next slide. Thanks.

So, they have an economic value. They, provide preventative services, obviously, as I've already mentioned.

They also bring value to the economy. Many people that work in local charities and organizations spend that money locally that they earn, they're based in their communities. They meet these basic and often a met needs, and they have both soft and hard outcomes which can change people's lives but in a way that supports them on their own personal journey.

And so they add value. We know that people are volunteering in small community-based organizations and the return on that volunteering investment is often much greater at community level than it is in some of the bigger organizations.

So that is the why we're doing this because we have that belief in small and local. Next slide, please.

So why are we doing this? And what is this? Next slide, please.

So what we did, we started in 2018 and we started to think how can we do this work to explore and facilitate these new ways of designing and resourcing local services with the aim of bringing people together in a different way, that will strengthen those small community based organizations because we know that they work well. So that they can be there for the long term to provide those support. The support to those people facing complex issues and they get what they need.

And that they're there when they need it and in the ways that work best for them. So, we wanted to move away from those four Ss of short-lived short-term small scale siloed to a different set of four Ss. Next slide please. And that they're there when they need it and in the ways that work best for them. So, we wanted to move away from those four Ss of short-lived short-term small scale siloed to a different set of four Ss. Next slide please.

So, we think this is about changing the system locally. System change is a term that's used a lot and it can mean quite small things and it can mean huge things. For us it's about getting people in a locality to work together as equals to create a new way of thinking. And we think there are three elements to help us do that. Situated engagement, sustained engagement and social engagement. I'm just going to talk. A little bit about each one.

The first one, next slide please, is social engagement.

So, when we started this work, what we were saying to our communities was we want to build a relationship with you and your partners. And we felt like doing it face to face was important. That we could then get into what is tacit, what is known, and what is explicit as well as what is unknown.

Of course, we started this work just as Covid was hitting, so we had to retreat from that, but we are now back in our communities regularly. Working alongside our partners there. We also felt it needed to involve people who used the services. As well as the people who deliver them.

So it's very based on relationship building and we're gonna hear a little bit more about that in a minute.

The next one, next slide please, is situated engagement. So we really want to get to know our six communities and their reality. They're all different. They're across England and Wales. And sometimes what we needed to really get underneath was we weren't coming up with the answer.

Sometimes funders get excited by scaling up or scaling across. We felt that you can't really take something that works in Bradford and jump it in Banger in North Wales or Basingstoke and expect it to work because everything is deeply contextual.

But what we do think we might be able to do is take out what we call the ingredients to make those contextual changes happen, and I think that's some of our learning.

We recognise that the context may change. I could say Covid again, but actually things happen in localities. You get a change of political leadership. You get a new infrastructure fund setting up all the things that can change the nature of how we relate to people, and so we wanted to really get them to that and get to know our partners. I'm finally, next slide please.

We also wanted to be there for the long term when we when we first took this to trustees in 2019 we said this this is going to take us ten years, now we get some challenge on that saying go faster you could do more and that might be true and we may see an acceleration as we move into the next few years. But we also wanted to make sure that we would work with people, invest in those places, support some quick wins, support some small changes that may be made and see how together they can build up to making the system shift.

And that that was really important that we built trust with people that we had time for reflection and that we could respond to issues as they arise in our places.

All of those things we think might cut up to next slide, system change where we think is a system we think as a whole. We think about behaviour, and we think about everybody because quite often in working in communities as all of the team have done or do.

We always think it's somebody else's job to be different, if only they would, if only they did, if only, you know it was somebody else this is about everybody coming together and thinking about how all we behave. And so the next slide is just a quote. And from someone some of you may know he's the chief exec of Lankelly Chase and he says you know a system isn't the actions of any one bit, it's how they all behave and how they behave together.

Just to finish off, I'm just going to give you a little example. Those simple example, last slide please, of how this works in practice. So, in North Cumbria there is a relatively new hospital and like hospitals do it needed a cafe for patients and for visitors and for staff, so they put out a tender.

They took a bit of a risk, and they challenged their own procurement a little bit and they awarded the contract to a community interest company that, works for people with learning disabilities and trains them in catering.

What we ended up with in North Cumbria was a cafe in a hospital, nothing new in that, but one which invests in it in the people who live their locally, invest in people with learning disabilities, involve them in developing and designing the cafe and which meant that they are employed, which quite in

turn means that they will probably use statutory services less. Therefore, releasing some money back into the system.

It's not a big example, it's not changed the whole world, but it's a really good example of how we can just think a little bit differently by thinking sometimes outside the boxes that we've got ourselves in. So that is kind of where we've got to with our work, and we're going to hear shortly from our panellists. So next slide, please.

Thank you, for listening, you can join this discussion online using the hashtag local change But, I'd now like to, introduce you to our panel. Somebody is going to do some magic and wizardry, I think and we will see our panel.

Yeah, can we end the presentation? Perfect. Thank you. Okay, so we're now gonna talk to four people who are going to talk through some of what we've learned through this work, who each bring their own perspective.

We've got Dan Hastings, who is our Local Implementation Lead in Great Yarmouth at one of our 6 places.

We've got Harriet Balance, who is our People and Communities Lead who leads this work within the foundation.

We've then got Pauline Mack, who is the Founder and CEO of Yellow Ribbon. An organisation that provides support for people on release from prison. She was one of the first contacts of part of the people and communities work in Telford and Wrekin.

And we've got Helen Highley, who's the Director of Brightpurpose who have been our learning partner in those first three years and have been walking alongside the team and helping us to learn and adapt us we've gone giving us the learning back, so we can change how we practice.

I'm going to ask each of them in turn just to spend about 5 min talking about the work and I'm going to turn first to Dan's reflections on relational change.

**DAN HASTINGS:** Okay, thank you, and good afternoon, everybody. I'm really pleased to be able to be here today to be able to share with you my experiences, my knowledge and my understanding of relational change in the context of systems change.

Just for clarity. When we talk about relational change, what I'm referring to there is the dynamics of relationships within a system. We know that systems change work often involves addressing complex challenges that stem from interconnected and interdependent elements within a system and these elements include individuals, organisations, and institutions of all size and and it's definitely worth saying that it isn't easy work.

So, for myself, as Jill said, as a local implementation, need working in Great Yarmouth, our system here has been focused on addressing homelessness and a huge part of my role has been in nurturing the relational change required to bring about a system-wide response.

We recognise that the effectiveness of a system is absolutely influenced by the quality and the nature of the relationships that it holds and this type of change often involves shifting the way that people and organisations interact with one another.

It's a starting point behind our work across all of our places, in terms of relational change that we've been focused on creating the right conditions, to stimulate change.

So, three years ago in Great Yarmouth people working in homelessness services reported to me that they felt that we had strong operational relationships, but we perhaps lacked a system-wide strategic direction.

So, we've worked hard, we continue to work hard to change that because we know that to deliver the change that we want to see, we need everybody to be involved and pulled in the same direction.

An enabler, if you like, behind that change has been to create the conditions to develop trust, as Jill mentioned, and create a shared vision that's really built upon values.

It's more than just providing the space or the conditions and that's really just the start. Relationships need to be characterized by trust, by openness and the ability to be able to disagree productively of all the hard work of changing the system or sharing the power before even begin this work.

As I said, isn't easy, it can't be rushed, and we spent time in all of our places working with our communities collectively exploring those values and behaviours that our communities felt, would encourage greater collaboration and build stronger relationships.

Again, as an example in Great Yarmouth, we listed trust, honesty, dignity and respect. Equitable participation alongside recognizing that the stronger together we have a shared vision, as our kind of key values and we've spent time exploring and defining each of these areas together.

However, a values-based approach can sometimes feel countercultural for some as people so often used to the norms that govern behaviours. It's been a real key for us to challenge those deeply ingrained cultural elements. However, a values-based approach can sometimes feel countercultural for some as people so often used to the norms that govern behaviours. It's been a real key for us to challenge those deeply ingrained cultural elements.

I've actually found that once you have the values-based conversation with people it makes absolute sense. I mean after all why wouldn't you want to work or live in a culture that supports trust on its honesty and dignity?

There's a wonderful quote in the learning report that says, we've all worked here and knowing each other for years, but we've never come together like this before.

So, learning tells us that it's key to encourage a culture of collaboration, cooperation rather than a competition and this is often involved creating structures or processes that support collective problem solving. There's clear evidence across all of our places and the importance of bringing people together over a common theme.

Once again, in Great Yarmouth, have been able to bring people and organizations together to develop and carry out a shared piece of research that really focuses on developing our understanding of how homelessness looks and feels by listening to the experiences of those who have been homeless and that grounding human voice experiences that provided us with that common ground to begin to solve problems together, but of course underpinned by our agreed values.

So it's also key to recognize and work at levelling out those power imbalances. This is involved empowering marginalized voices, promoting inclusive decision-making processes and working to promote a culture where power can be distributed more.

It's been rewarding for me personally to work alongside a group of people who have lived experience of homelessness and Great Yarmouth. Bring them together with service professionals to design and deliver pieces of work. They said that, and a quote, we're a bunch of homeless people in a room full of professionals, but we feel like equals.

But again, for many professionals working in the system, this can feel like a new or different concept, it because they're so often used to designing and delivering services themselves, cause that's the way they've always done things. So, for some, we recognize that it can feel like a loss of power to be part of that relational change.

But these spaces that we've created, the principles that we've developed that have strengthened those connections and those networks within the systems within all of our places.

We've laid the foundations really to build our future work and relationships, but no doubt there will be many harder conversations to come, but we feel like we've begun to break the surface and make some progress.

Throughout all this is to consider how we are distributing ownership to building local leadership for the work for it to become self-sustaining. As I



said earlier, it isn't easy, but already we've seen pockets of self-stimulated collaborative working, as organisations work together on co-financing opportunities and exploring longer-term ambitions together such as alternative models of housing.

I hope that this and our learning more broadly provide useful insight for others to learn from our work as I feel that the approach gives a hope for a new way of working for communities and to help them unlock their potential for the future. That's me, thank you.

**JILL:** Thanks, Dan. Thank you. Okay, I'm now going to ask Harriet to step in and talk to us a little bit about local ownership and systems change work. Harriet.

**HARRIET BALLANCE:** Thanks, Jill. Hi everybody. So, I'm going to start off by talking about local ownership. Which is one of the kind of lessons that's come through in the learning report. The way that this is kind of manifested itself is with our work obviously right back at the beginning as Jill was saying just pre COVID. We instigated this work, and we instated it for good reason to address those challenges that Jill was describing in a presentation.

But we know that it can't all be the foundation's agenda and actually this is about us doing differently too so it's really important that it is locally owned and locally led.

So very much about the Places taking the lead and the places are setting the focuses and we've worked with them on identifying what their vision and focus would be locally so that it fits the local priorities and their local context.

But this way of working is quite countercultural from a funder. It can be quite confusing and difficult to accept and trust and people talk to us quite a lot about how organizations tend to parachute into local areas, you know organizations that are working nationally, for example.

I think we, you know, we really wanted to work in a different way where we work, as Jill was saying, in a long term way alongside the places. And support that kind of strength-based and local focus.

So, that's been the, it's been an interesting thing to witness and to work with because certainly at times I think people have felt like well can you just tell us what is that you want us to do. But of course, what we're looking for and keen to support is that that is locally owned and locally led.

So, certainly for us as a team and with the local implementation leads. We've had to have a really relentless focus on dispersed ownership and leadership and as Dan was saying, you know, that thing of building local leadership in Great Yarmouth. We've had this phrase of sort of giving back the work because the temptation is for people to look to us or to the local

implementation needs to set the direction and because it's hard and we're in complex unclear territory and trying to do new work and find new ways of working.

That sort of tendency to look to us, can you do it for us or work it out what the next step is, but we've very much been kind of focusing on how we how we kind of all work that out together.

And one of the metaphors that Brightpurpose is used with us as a team, as our learning partner was about 'shining the torch at our feet' as we set out on this really new, .. you know exciting but complex piece of work so we would know where to step next.

I think you know that metaphor is kind of transferred to us as a team with the communities as well. So can we, as they are finding their way, it's setting up new ways of working and doing things. Can we shine the torch at their feet as well and kind of help people see where to go next.

Obviously running through all of this, power is a huge factor. We have lots of power as a funder, so there's a question about how much power we should deploy and how we explore our role in relation to working with the communities. You know, we are our mutual brokers sometimes outsiders as well, so sometimes able to ask the questions to other people maybe not able to, or one of the things that that's been really clear and coming through in the work and in the learning report, is that ability as an outside organization sometimes to point out issues or start conversations that might be hard for others to do.

We all within the team had experience of working in local organizations and local areas and know how difficult it can be to tackle some of those local dynamics.

So there's been something for us about learning about how we understand our and think about our role and there's one another kind of metaphor that's come through in that is there's something about holding up the mirror.

You know, this is what we're seeing. Does that seem right? And that can both be about things that are difficult or challenging and trying to instigate those different conversations, but also actually about positive things as well.

Sometimes, you know, recognizing strengths and sort of seeing possibilities. So that's all from me, do stick any questions you've got in the chat. Thanks very much and I'm going to hand back to Jill.

**JILL:** Thanks, Harriet. Okay, I'm going to hand over to Pauline and we're gonna hear from Pauline a little bit on her perspectives on the role of money drawing from her experience working in Telford and Wrekin.

**PAULINE MACK:** Hello Jill and everyone. I'm really excited about this whole project that Lloyds have embarked upon and was very lucky to be contacted about five years ago by geologist to knock this idea, would Telford be interested in this.

And my background is looking at use of resources across whole areas and transformation. So I've been a performance specialist, I've looked at the money side and the change side, so this opportunity to be involved in Telford's work and see how we can unlock resources by having a clear vision together and really coming you know as Dan said, looking at relationships, all about relationship is all about ownership as Harriet said but it's all about unlocking resources to release the strengths in the community amongst all the different partners, all the different players.

It's not so much about the money, because money is sort of seemingly not used terribly well and one of the key things that you find is that very clearly defined commissioned Projects require a lot of bureaucracy and accountability to ensure that the money is used well. So on a recent contract we had, we had about 40% of our time just based on compliance and getting monthly returns in rather than money spent on the front line on the real difference with fragile people who need that support.

So, you know, one of the key points is that funding packages can be a distraction. It can change what you put your effort, your time in and sort of run their own story, so to speak, but bringing people together to go what's in your hand.

What Daniel was sharing is that in his community people knew each other and they probably had a nice coffee together in meetings, talked about things, but nothing, no deep change happened. So building on relationship and sharing resources, looking at what do you have in your hands and being honest and transparent about what your weaknesses are and what another strengths are, so that you can build and work together to release what's needed for change.

The other thing is that there have been ways that the government have recognised this in things like troubled families. Where it is recognised that complex issues happen to the same people. This whole thing is by people and communities but place on one side of the street you will have - you can have people living longer doing well, and on another side of on the street you can have you know mental health issues, inequality, staying away from school - all these sorts of things happen to the same people, so then we really need to put our resources together and to look at the deeper issues.

What is at the root of our issues and in Telford we've picked something really quite challenging to look at and that's about unlocking potential. And what we've looked at and it's been a wonderful interesting opportunity to look at the tree and its roots system and look at well on the obvious bit is the tree but underneath the tree there's all these roots and all these reasons behind people's lack of aspiration.

And it's the same with resources, there's so many hidden resources, that I think going on a deeper longer journey. We're looking at trying to tackle. The point, the problem of things being siloed.

Trying to release resources across a holistic issue and looking at the long-term and lasting change which requires a lot more deeper thinking to move through it.

We're collaborating on values rather than money and the need to be generous, to be open and honest about our strengths, what we can share and what where we need help to tackle barriers and blockages and also in the discussion about power that Daniel had. That's another big thing for small charities.

You know, we might get more of an honest voice from our clients that people with complex needs. And we have to advocate with them, speak truth to power sometimes to see their potential be unlocked, but so do we within this system change with the public sector organizations and charities and funders coming together.

We can speak truth to power and businesses to see where, how smaller voices can be heard, and those smaller voices may well be those of us and leading small charities.

One very quick example is, a way, of there is more than enough resources is how just soft skills are lacking in some of our young people to get work, but in older people they have got soft skills but how often do we look at putting together the physical needs of older people with the soft skill needs of younger people. Just there are so many ways we can think out of the box to release resources. I look forward to your questions. Thank you.

**JILL:** Thanks, Pauline. Okay, so finally before we head into questions, Helen Highley from Brightpurpose is going to describe what we think of some of the key factors to balance to enable system change.

**HELEN HIGHLEY:** Hello, thanks Jill and hi everybody. Great to be here. Just before I get into balancing those factors which have already come up quite a lot, which is great for me - Thank you.

I'd just like to talk a little bit. The way that this work is different in terms of actually moving it forward and the solutions that we might come up with. So everybody's already talked about how different this work is. And that means we need different approaches, different solutions, but that's not necessarily easy because we all work in organizations where we're accustomed to thinking in terms of what we call technical solutions, services, projects and programs.

You know the kind of thing with well-defined processes, Gantt charts, fixed budgets. It's our comfort zone. It's how our organizations work. My comfort zone too, because I've grown up in this culture too.

We automatically default to looking for a technical fix and why wouldn't we? Because we want to make an impact as quickly as possible. We're meeting people who really need support and we want to get that support to them quickly.

Technical solutions in our experience are pretty easy to design and relatively easy to deliver, and Jill pointed out quite a lot of them in her slides in terms of funding programs. But in reality, they don't result in lasting change. We know that and if they did we wouldn't need to be doing this work in the first place.

And what we found is that partners in the six communities and in the foundation team know that their ambitions need new solutions and that the answers don't lie in project programmes and services.

They know they need to take risks, try new things and some of those might fail. But if they want to address the challenges that identified, that's what they'll need to do. But knowing it and doing it are two really different things. We can be tempted to revert back to our comfort zone, sometimes even unconsciously.

As communities are coming up with and agreeing the areas they want to focus on, we have seen some cases where people have reverted back to project thinking, maybe it's a quick win, but it might not be moving you in the right direction.

That was probably inevitable. Given that it's how we're all used to working, but it's crucial to resist the allure of these technical solutions and remind ourselves that they haven't got us where we want to go in the past.

So why would they now? The local implementation leads like Dan, and the foundation team have a key role here in encouraging local partners to stay ambitious and innovative and remind them that if it looks like a project or a service it's probably not the answer. But there's also something about us all developing the confidence and the skills to work differently and to keep our attention on the long-term vision even when the short-term pressures are really high. So that's technical solutions and resisting them.

Let me now move on to the factors that Jill mentioned about keeping in balance. I'll just quickly check and most people familiar with the story of Goldilocks and the three bears. Essentially Goldilocks breaks into the three Bears house in the forest. She's hungry, she's tired, so she tries all their porridge and all their beds and found that in both cases there was one that was just right, not too hot or cold, not too big or small, but just right. And we found 4 factors in this work where there's a balancing act to get these just right too.

So the first one is power. Where it sits, how it's used and how it's shared.

Harriet gave a great example of how the foundation have been thinking about their power and perhaps sometimes choosing not to use their power for fear of interfering in local work and dynamics, but there's something about finding the balance to be able to deploy their power for the good of the work.

Without being heavy-handed and supporting others and modelling how we share power. The next one is about certainty and this has been and is very uncertain work. We didn't know where we were going, we do know some of the steps now, but it's still shaping and evolving and not everyone works effectively.

In the context of uncertainty, it can be really difficult for some people. So how do we make that uncertainty and abstraction psychologically manageable for everybody?

The next one is pace. Go too fast and you lose people. Go too slow and you lose momentum.

It's fair to say that probably the local implementation leads, and the team felt that they were going too slow, but often it felt right in the communities because everyone in the community had busy priorities and day jobs.

And finally, the shape, so this is really experimental work, so it's not possible to define the shape fully. But people need something to imagine and something to shoot for and three years in, there's more shape than there was on day one.

We know now some of the components of making change happen. Those ingredients that Jill talked about and that helps people feel clearer about where they're going.

With all four of these Goldilocks factors as we've been talking about, just right looks different in different places and at different times it's not a nail it one and done. One of the real skills of this work is holding each of those factors in a dynamic balance. Thanks, Jill.

**JILL:** Thank you. Thanks, Helen, and thanks to all of you on the panel. Okay, we are going to move to questions now. If you have any questions, you want to put them in the Q&A, please do. In good old children's television style though, we already have some, that we collected earlier.

So Dan in a minute I'm going to come to you with the question about if you were starting to come to you with the question about if you were starting again now knowing what we've learned again now knowing what we've learned what might you do differently.

But Harriet, could I come to you first and just ask one of the things that sometime gets in the way for us is -We're so deeply connected to the work, we sometimes can't see the wood for the trees, and I just wondered, what you could talk about how we've learned about how to deal with that. A little bit.

**HARRIET:** Yes, thanks, Jill. Yeah, it's really true.

I think with the level of complexity and attention we're giving to things. It can sometimes feel really hard, but you're just immersed in it, you can't see the big picture very easily.

And the concept that we've found really useful in that is this concept of the balcony and the dance floor, which is something that came through in some way we did around us up to adaptive leadership, which if people haven't come across it, it's been a really useful.

The framework for thinking about this work essentially is that if you're on the dance floor and you're dancing, you can see the people near you, and you can dance with a couple of other people but you can't necessarily see the big picture.

Whereas if you get up onto the balcony you can look down and you can see what's happening and you can see who's dancing with who and who's not actually dancing at all, you know.

And so, so this practice of thinking about how to step out of the situation and try to look across and to do that with somebody else as well so you can kind of talk through and think about what you're seeing is really helpful, So I think for us building that into what we're doing, it's been really important.

**JILL:** Okay, thanks. So Dan, if you were starting again and hearing and being part of what we've learned, would you do it anything differently?

**DANIEL:** I mean, that's a fantastic question. And I think, we that... I probably wouldn't change anything at all. If I'm honest, I think we need to be realistic about, you know, the size, the complexity of the work, its built upon relationships and we're doing that all the time against an ever-changing social environmental and economic backdrop, like you mentioned in the in the

slides that you used to the top, we think about all the factors that we we've gone through.

We started this work in Great Yarmouth during the pandemic, with bringing people together, to develop those values and trying to achieve that, that shared vision and set that ambition during really, really difficult circumstances for people and, you know, we've come a long way.

As I said, in my presentation we've got some much harder work to come, but looking back at what we've done, isn't anything I think that I would have done different.

If anything, I find myself in a position for two and a half, three years down the line now, where I've got a great deal of learning that I think sets us up well, to know what works to be able to apply things in the future.

**JILL:** Okay, great. Thank you. Okay, we've got a question come in really good question says collaboration, cooperation and collective problem solving was mentioned. To what extent is this important for funders? And should different foundations be collaborating and aligning their values and vision?

Before I hand that over, I'm just gonna say a couple of things on it myself. One is that at a local level in our six communities we are involving other funders. So, we're trying to get them to align to this work and to collaborate with us in our six places.

I think your question though is a really interesting one about funder at a national level and how do you trust some foundations with different missions, visions, restrictions come together.

I think sometimes that's about finding common ground. But I think that's quite a big ask. We as a funder do collaborate with other funders, but this work at a local level is much more about when bringing everybody together and seeing everybody as a funding, including health, universities, businesses, as well as local authorities, trust and foundations.

I wonder, Pauline, given that you were talking about the role of money, whether you have a view on how funders might collaborate, cooperate and collectively problem-solve together.

**PAULINE:** I think potentially the same way that you've taken one issue in each area is the one burning issue that could be considered, that to tackle to see if there are shared objections, shared values to unlock some of the real barriers in the system and whether, you know, I think money speaks, doesn't it?

But it's kind of been able to not only collaborate and vision together, but demonstrate the difference, the impact. I think with always when we're looking at resources, we need to demonstrate lasting impact and



evidence, good evidence that demonstrates change and value for money.

Value for money is the key but strong wonderful impact and stories but maybe taking one or two big burning issues, that's on the public's heart.

That was the other thing. Is there a way of engaging the public in this journey? Because that's you know people's hearts and minds and taking people on the journey to actually get system change in the nation on some key issues because people are very set in their ways in their thinking that people can change and big policy decisions, masses of money go certain directions just because of what the papers write. So, so there's a big communications exercise as well in this.

**JILL:** Thank you. That's great. We've got a great question here, which I'd just like to preface by saying we get things wrong All the time, by the way. But the question is, how do you know when something has worked and would you share with us any failures or disappointments?

Part me wants to say how long have you got. And Helen, maybe you could help us answer that one because you have been with us on these three years and seen us as we've walked two steps forward and three steps backwards sometimes and working with our partners.

**HELEN:** Yeah, sure. Okay. I think we're still finding out what's worked because things sometimes look like they're going awry and we do some recalibrating and keep going and things start to turn around. I think it the proof eventually is going to be in what changes for local people.

But the reality is that you're innovating, and it would be a miracle if everything went well. The trick in this, I think, is to be keeping a really close eye on what's happening and testing out whether it feels right or whether actually it's starting to have some unintended consequences.

So a really close, it's not monitoring, it's keeping a weather eye on what's going on. I'm not going to pick failures or disappointments on behalf of the team. I'm sure you've all got them.

I think my job and my team's job is to highlight when things maybe haven't gone as was originally intended and say, so what did we plan? What happened and why was there a difference and is that okay or do we need to do something differently as a result? because we set off in a direction and Jo;; talked about all the things that have happened since the team started working and some of this is contextual and some of it is you try and conversation and it doesn't land.

One of the big challenges has been communication in terms of describing this work to other people, and I still don't know if we've all got it right. I practice over the dinner table with my family who still look at me a bit blank.

But trying to explain this work in ways that resonate for different people is an ongoing challenge, and I think if we nail that as a group. Then that's massive learning for others.

**JILL:** Okay, thanks. And very easy one to answer Harriet is we've heard from Dan that their focus is homelessness and we've heard from Pauline that the focus in Telford and Wrekin is unlocking potential. Somebody asked us what the focus in the other four areas. I wonder if you just want to quickly share those before we go on to the next question.

**HARRIET:** Yeah, sure. So, it's Homelessness in Great Yarmouth, then in Merthyr Tydfil it's children and young people's mental health.

In Telford and Wrekin as Pauline was saying it's aspiration and unlocking potential and then in Bolsover it's also aspiration. So, we've got two places with sort of quite similar focus.

And then in Halton actually, you know, we've just been talking about trying things in not necessarily going in the direction that you thought, or you know sometimes needed to reset a little bit they did choose food inequality in the in the midst of COVID when we were getting this work underway. But I think that we're now looking at a reset of the focus there.

And then in Redcar and Cleveland, the work started a lot later, but we've just arrived at a focus around community power and sort of starting to delve into what that might look like in terms of, you know, like sharp focus on a specific thing within that.

So that's where we are, with the six places at the moment.

**JILL:** Thanks. Okay, Dan, a question I think that I'm going to come to you on because it's very specifically about work with homeless young people, So the question says, our team works with homeless young people, we understand what young people go through, their complex needs are always a safe space for them. We need other statutory services to understand complex issues and

.. opps sorry just my page slip hangs on a minute ...

and we need other statutory services to understand complex issues and communicate with each other to support. So I want to know how was working differently would bring social change and what we can do to aid that. I can see the change happening in people's lives but not in society or other services. So, I wondered Dan if you could just reflect a little bit on what you might have seen in Great Yarmouth around this.

**DANIEL:** Yeah, again, great question. I think there's ... absolutely something in this work about, as I said, relationships and there's also something about what Pauline mentioned which is going to find in that that that synergy between everybody's aspirations.

You know, public sector organizations and statutory bodies will often design projects and you know, deliver pieces of work in a very classic way, and I think there's absolutely something about being able to have a conversation with them. And influencing change, I've found personally that it isn't necessarily easy to tell them what they should be doing and what you'd like them to do, it's much more about maybe being able to lead the way or demonstrate or influence through successful pieces of work that either have happened elsewhere in your own communities or have happened elsewhere across the UK.

But as I said, I think a lot of it comes back to being able to find that middle ground everybody wants to pull in the same direction, services aren't designed to fail I'm absolutely convinced of that. Its being able to, to find that common ground and read things forward together.

**JILL:** Lovely, thank you. The next question, it says how the program is different from things like Sure Start and Trouble Families approaches, which were also about working together to tackle complex issues. Is it about power sitting at a different level?

Pauline, you mentioned Trouble Family, so I wondered if you had a perspective on that question.

**PAULINE:** I would have loved to have been involved in troubled family's work and previously in my audit commission days I did work with Director of Children's Services about those funding streams that going into Sure Start and the way he put all the funding together to work in a place really inspired me.

I think Troubled Families had a great opportunity to do that but sadly the governance that overall assessment and inspection wasn't in there to put integrity into them, into how this was done in the learning from it. So, great idea, not so wonderfully implemented and ditched, but the concept is great.

**JILL:** I think for me the concept isn't dissimilar, so the question is, is this about power sitting at different levels? And I think this is about getting everybody to agree what the approach is, both Sure start and Trouble Families were in post, they were central government programs and I agree, I thought Trouble Family was great, but then I was involved with it, So I won't say that. But I think this is about bringing people together to collectively agree. What that should be so the power sits at community level, I think.

Okay, we've got some more questions that we're not going to have time to get through, because we're going to stop for a break but in a pick by all means pick them up in in the breakout rooms, that we've had afterwards.

Just one really interesting question it says - following your reflections and learnings what do you hope will happen next how will this learning be shared wider or be used to lobby policy change. And what are your aspirations for the future of funding and your relationship with places?

So I'm not quite sure who that's targeted at because it sounds like it's targeted at us a little bit. So maybe I'll just have a go quickly saying I think for us our aspiration is to continue to support our six places and look at how we can share the learning more widely. So other people can try things like this too.

To a large extent this work is happening anyway in other places.. people may have heard the work that's happened in Preston. People may have heard about the Wigan deal. These are all similar but different variations on getting people to work together differently.

I think for us as a funder we do or already work in different ways with other funders, and I think it is changing how we fund so we have recently launched we launched a couple of months ago a grant program funding collaborations rather than individual organizations which is a bit of a change for us and that links back to our role as being trying to influence the context within which charities and other small organizations operate. So it is kind of beginning to an impact on the way that we think about how we fund in our relationship with other funders.

I'm sorry we didn't get through the rest of the questions, but like I say, please do bring them up in the breakout groups. It's 3 o'clock and we're going to have a 10 min break.

If you come back for 15:10 and then we'll move into breakout rooms, and I'll tell you how that will happen, and we'll hear your reflections on the learning so far.

So go and have a stamp n shuffle, make a cup of tea, whatever, and we'll see you in 10 min. Thank you.

[BREAK]

**JILL:** So, we are going to move into breakout rooms. Now because we want to hear from you, on your experiences of this kind of work and your reflections on this work and our learning and any thoughts you have about it.

So the power is in your hands and to choose one of two topics to discuss, and these are number one impact - so what does what do we mean by

impact in this work? What would it look like? And how can we show impact and demonstrate in impact.

The second one is behaviours, so we've heard about people having to work differently. So, we're interested in your perspectives on what behaviours you think need to change and this does relate to a question actually in that we didn't get round to and what behaviours need to change in order to make change like this possible.

In a minute we'll open the rooms, and a pop-up will appear within Zoom asking you to select a room labelled by topic. So, select the one that you're most interested in or keen to discuss and then you'll move into that room. There will be note takers and facilitators who come from the Lloyd's Bank Foundation team.

And then when we come back, we're going to try and capture from those discussions the main themes.

And so, as you come back, we're hoping that we'll be able to show you through a menti metre, some of the key themes that emerged. And then we will be following up the session with a blog summarizing the discussions. So, by the power invested by me, somebody is going to push a button and you will all magically disappear into breakout rooms.

[We had technical difficulties during this and were not able to show the menti metre]

**JILL:** Okay, thank you. Welcome back everybody and, thank you for joining the breakout. I hope, that's felt like a positive use of half an hour of time just kind of discussing and sharing.

I'm going to round off today's session by just sharing a little bit with you about, what's coming next and how you can stay in touch and where we're at.

Our developmental evaluation is focused on three strategic learning questions.

The first one is what does it take to work in a different way with communities and support them to change their corner of the world.

The second one is what works and what doesn't, when working in this different way.

The third one is what difference does it make when we work together with communities like this to support change?

Until now, our learning is concentrated on the first two questions. So, we've been forming the work, building relationships, working out with people, what

skills and development needs we all have to work together in this different way.

And hopefully today you've gained a bit of insight into what we've learned so far. But moving into next year into 2023 the focus will shift and as Helen Highley reminds us the rubber is going to hit the road and activity gets underway in the places and we start to look at the impact that that has. So, I'm just going to talk you through some of the what those things are in their grouped under theme.

So the first theme is about engaging stakeholders. All six places have gone at a different speed and for some places as a need to bring more stakeholders into the work, particularly those strategic stakeholders who often control the money and control the flow of resources.

So, in Merthyr Tydfil and Great Yarmouth, Bolsover and Telford and Wrekin, there's a focus on developing local ownership and local leadership. And in Telford and Wrekin and Merthyr also that work to build engagement with local people.

In Halton, the work is slightly different in their focusing on local leaders. And particularly around health, including the newly formed integrated care boards. I say newly formed they're not that new or they know. So that's kind of work going on to get that more local ownership leadership from the bottom up from local people and service users but also from strategic People with power and resources.

The second theme is defining the change they want to see, so that will include in Merthyr Tydfil partners, co-creating a vision around what it is they want to really improve around their theme of children and young people's mental health. Whereas a group of local residents working with our local implementation led there have been working as community champions, community connectors to really connect and find out hanging around the shopping centre hanging around finding out what people want.

In Redcar and Cleveland, we've been hearing about partners who've now had a bit of a reset in Redcar and Cleveland. We had to pause the work, but we're starting now, and the rubber will hit the road next year in getting people together to really think about citizen and community power, and what that means and how can community, the community and citizen power can contribute to shaping those services that are needed for people.

Then back to Halton and the way that they're developing local leadership around health. That will be move into action on collective action to tackle health inequalities.

In Bolsover the work, has been building on some early work, that I'll talk about in a minute about a positive language guide but really needing to

define the short and the long-term changes that they want to see there around their raising aspiration.

In the next heading it's about planning action and moving from talking to working out how people will act together, how they will act differently. One of the – I was just chatting to someone about one of the struggles they've got is around people have signed up to do something different, but now they're not getting what they wanted. They're questioning the validity of doing different tasks.

Really hard and working out how you'll tackle difference and what approaches work well. So, thinking about how we can give people this skills and the confidence to tackle difficult conversations because sometimes they can be.

So there's going to be planned activity in Merthyr Tydfil on improving mental health support, for specific groups of young people.

There's now a young people's group forming in Telford and Wrekin to plan how to influence more accessible approaches to education and employment and partners in Redcar and Cleveland have come together several times to really think about people with complex and challenging needs. How do communities and people work together to create them.

Our final theme is that thing around taking action together, convening people, bringing people together and that's one of the roles that we have as the foundation.

So in Telford and Wrekin, I think I mentioned, and your people thinking about accessible approaches to employment and education, but actually that needs employers who are coming together, committed to reimagining recruitment and how they get people into jobs.

In Great Yarmouth, Dan's work with the homelessness alliance will be focusing on collaborating to deliver the clear activities they've agreed in their fifteen-year vision tackle homelessness and create services that homeless people say are the ones that are needed. And similarly, that lived experience will focus using service design, which is one of the methodologies that we are using to design and redesign the current services. So, they better meet the needs of people.

I mentioned in Bolsover one of the things that Bolsover feels is that often people talk about their place in a very negative deficit way. So, partners have come together to create what they're calling a positive language guide to really get people to start talking about Bolsover in a positive way. We hope that that will be of use to other places too.

And to my final point about our places is that, is connecting them across the places and learning from each other and what they're doing. So next year

we're going to be doing some work to bring them together. Around equity, diversity and inclusion.

Yes, we're working with Lived Experience. Yes, we're working with residents. But how do we really make sure that equity, diversity, inclusion is threaded through everything that we're doing in place and that we ensure all the voices that should be in the room are truly able to be there.

The second thing we're going to do is we have worked over, feels like the whole of my life, but I think it's only been about three years, but we worked with a number of small organizations to develop in what we call the organizational resilience program. So I mentioned early on that we know small community based organisations are often so busy delivering services.

They haven't got the time to think back and think, oh that grants coming to an end. How could I diversify my income? How could I become more resilient?

And the reality is they can't become more resilient on their own because it needs those strategic partners with resources to work differently and think differently about how they commission or how they grant give or how they make things happen in their locality. We heard on in the little group that I was in about.

One commissioner has moved from one year funding to three years funding. That's progress and it's how we use all the resources in a place, to come together to do that. So, the organizational resilience program is being rolled out initially to two of our places, but will involve a group of stakeholders, not just small organizations, because they can't do it by themselves.

And will be evaluating that program and then if it seems like it's having impact, will be able to offer it to others. But if you're interested in it, it is actually already available on our website for any organisation or system partners to use now, so by all means have a look at that.

In October just gone for the first time in this work we brought all our six places together they'd never met before they'd never come together. There was a real energy and a connection around learning and keeping connected and being able to share the assets and resources that they're building like the positive language guide, light system mapping, like service design and sharing their experiences. So working with our colleague Poppy, who's our learning networks manager, she's going to help us to keep the six places connected.

And then as we do more community-based work, our local collaborations grant program and a funder a collaborative we're involved in called local motion we want to see how we connect all of this work and bring together all the learning so that we get better at it. Our places that we work in with



benefit from that and then other people can benefit from it too. So we hope to continue, to do that.

So that kind of brings us towards the end of our time together. If you want to keep in touch and keep up to date with this work, then get in touch with Harriet who you heard on the panel and we'll be able to link you in and we'll send you Harriet's email, after this and she'll be able to send it out to the relevant place or the relevant team member that can help your queries or keep you connected.

So, it really just remains for me to thank everybody for joining us today. We're delighted so many people really wanted to hear about this and quite humbled that people wanted to hear about this, and the breakout will be really valuable for us and, hearing your thoughts, as I said, we're going to be producing a blog, writing up the breakout group discussions. So, look out for that.

So, I want to thank Nick and Haley our British sign language interpreters for their work helping us make this accessible.

The four panellists, Harriet, Helen, Pauline and Dan for their time. Also all of the team that Lloyds Bank Foundation who enable people like me to rock up and just talk without having to think of what buttons to press. Thanks to them.

Finally we will share the recording and we'll also share the recording and we'll also share the presentation.

And in a minute, I am told reliably and there will be a survey will pop up on Zoom and we'd really be grateful for your feedback, good or bad, because that really helps us. And informs us on how to do future events like this and what people find helpful.

So we'll be really grateful. If you take a couple of minutes just to complete that. Other than that, just like to thank everybody for joining in and enjoy the rest of your day and your week.

And the weekend when it comes. Thank you very much.

[END]