

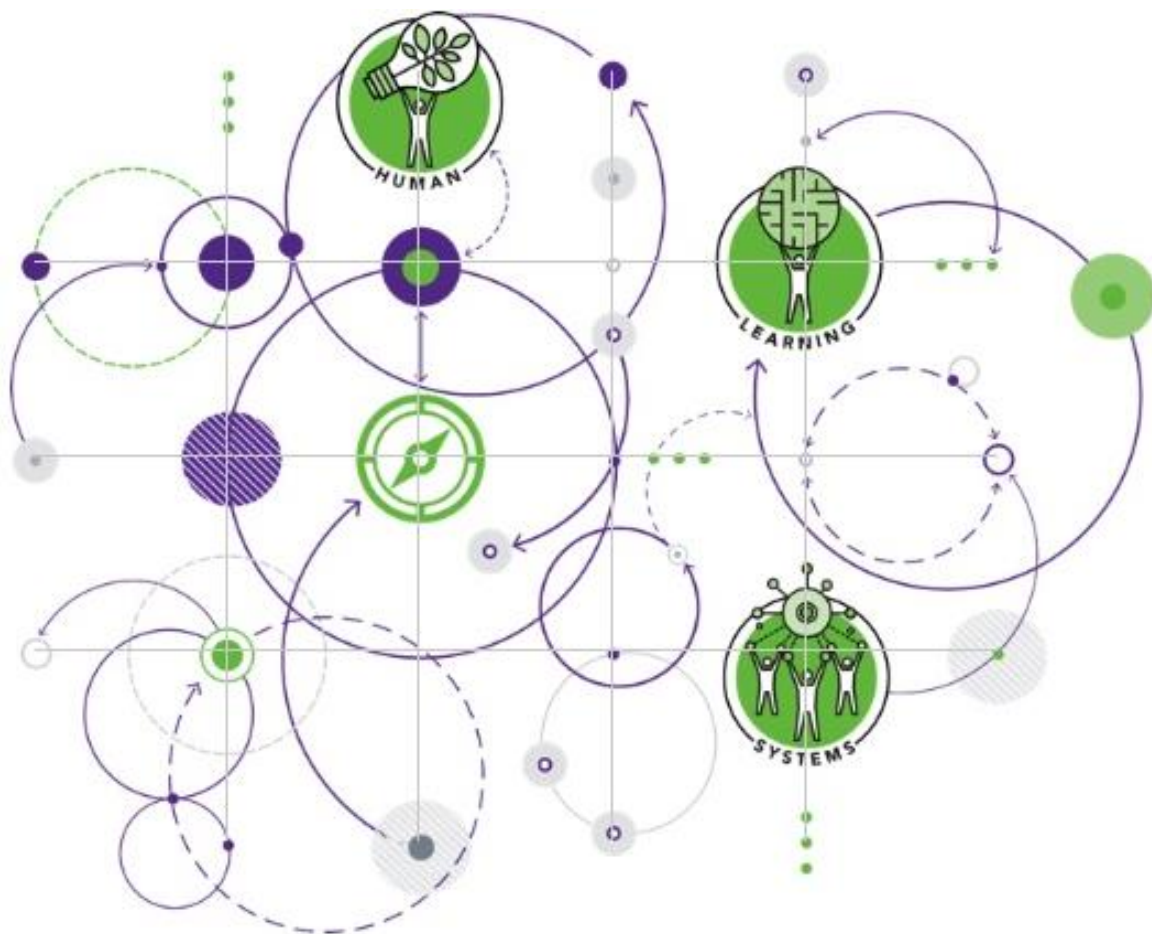
Exploring the new world:

Case study

Stirling Council and The Robertson Trust



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STIRLING COUNCIL AND THE ROBERTSON TRUST SYSTEMS CHANGE CASE STUDY

Overview

The Robertson Trust is an independent charitable Foundation which focuses on tackling health, social and educational inequalities prevalent in Scotland. In 2017/18, the Trust worked with Stirling Council over a period of around 15 months to explore the potential for an early intervention, systems-change approach to improving outcomes for children and families in the area.

Crucially, the starting point for the conversation was not about providing funding for projects and interventions. Instead, the Trust offered facilitated support for key stakeholders in Stirling to explore a collective approach to solving complex problems facing children and families. What followed was a series of facilitated discussions exploring a systems-change approach and implications for the culture and behaviour of partners in Stirling. By shifting the focus from action planning and delivery towards purpose and shared principles, Stirling partners were able to make progress in three key domains;

1. Restructuring of Children's Services

Technical restructuring had already begun to bring social work and education services together. The facilitated process helped shift focus towards cultural implications of restructure, helping people work differently together.

2. Developing place-based work

Using a test and learn approach to service integration by co-locating multiagency teams in two localities with the aim of working more closely with communities. Practical co-location had begun but no work on *how and why* this approach was the right thing to do. The facilitated process

helped explore this and later led to the development of a set of place-based principles (see *below*).

3. Evolving systems leadership Supporting a shift in mindsets of Senior Managers and Leaders towards systems leadership; embedding clear moral purpose (focus on best outcomes for children and families); and enabling everyone to think of themselves as systems leaders.

The Story of change

The starting point

The Robertson Trust had been delivering a proactive, programmatic funding stream for well over a decade and were beginning to explore Systems Change as a way of achieving lasting social impact. Though they would not fund public sector bodies, they recognised that to achieve traction on complex social issues would “require ... joined up working; we needed Local Authorities on board, or the approach wouldn't work.”

Meanwhile, Stirling Council was undergoing a significant amount of technical transformation of organisational structures and service delivery (integrating Children's Services and developing a place-based initiative). It was recognised that more needed to be done to explore the cultural and behavioural implications for these new ways of working to be successful. This became the starting point for Robertson's work with Stirling Council, made effective through the following foundations;

- **Early exploratory conversations:** allowing space to develop the relationship
- **Not defining an outcome or project:** value of an open process
- **Taking a systems-change approach**
- **Setting a clear intention:** in this case focusing on the *how* rather than the *what*
- **Being clear about partners' roles:** no agenda or funded project

- **Readiness of partners:** to engage in a very different process

Progress and challenges

It is clear that partners in Stirling feel the facilitated process made possible by the Trust's support played a critical part in recent progress on work with children and families. It stood out from other forms of Organisational and Professional Development some had experienced as it was "open and emergent, relational, longer-term, intellectually challenging, philosophical." There was a strong sense that this would not have been possible to do in-house and was particularly valuable due to these factors;

- **Skilled facilitation:** able to hold uncertainty and complexity, communicate theoretical content and apply to practice, interpret and work with group dynamics with sensitivity.
- **Financial investment in the process:** availability of independent funds at a time when public services are focused on savings made this work possible.
- **Independence of the Trust and facilitator crucial to success:** not 'owned' by any one partner
- **Prioritising purpose:** beginning with a shared sense of purpose, of why the change is important, is a prerequisite for any subsequent technical changes to have success
- **An institutional commitment to reflective process:** the need for partners to commit to a process, ideally for a set period, regardless of other external changes and challenges. There is a risk of damaging relationships and trust if commitment wavers.
- **Awareness of the bounds of reflective space:** importance of holding an emergent space to develop shared purpose and principles for a time. Maintaining awareness of pace and the energy of the group to move into embedding ideas in practice at the right time is important.

Another key success is the emergence of systems stewards in Stirling who are in key positions to model different ways of working; across boundaries, shifting focus towards shared principles and nurturing the health of the wider system. This includes people in positions of leadership who are able to drive this work forward.

The wider context has presented a number of challenges, particularly in significant structural and personnel changes, including in key strategic roles. This impacts on the operating context for employees (creating uncertainty in everything from strategic direction to day-to-day delivery) and also created churn in the group participating in the process. The support from the Trust was viewed as helping to create much needed stability during this time of flux, maintaining a focus on 'the things that mattered most'.

The HLS approach

In *Exploring the New World*, research highlighted some common approaches among interviewees in responding to complexity:

Human – recognising the variety of human need and experience; creating an environment that build trust and empathy between professionals and with people; taking a relational, trust-based approach with partners.

Learning – focusing on collective learning to drive improvement; cultivating infrastructure and culture of learning for others and selves.

Systems – awareness of the interconnected nature of complex issues; investing in the 'health of the system', facilitating connections and holding space for others.

Features of an HLS approach of the work in Stirling are described here.

Human

The internal process

Using a relational approach was at the heart of the process, with staff at the Trust modelling this approach and employing a facilitator who could help nurture relationships and group dynamics in the sessions “ensuring we could let go of day to day roles, to come into a space to challenge, support, deepen thinking, ask questions, challenge perspectives – all in a way that was non-threatening.”

For the funder, this meant being explicit about the very different terms of the relationship; demonstrating that their primary focus was on supporting a conversation required “acknowledging the power dynamic that often exists when money sits in the room.”

For partners in Stirling, this helped to build trust by allowing the space to have difficult conversations (for example, about cuts to services), pushing back against a culture which sometimes kept difficult subjects “outside the room”. This was felt to have brought alignment around values where previously there had been divergence. The process of exploring deeper personal motivations and purpose was viewed as particularly powerful:

“When you give people time and space to consider why they’re there and ... the reasons they became a social worker, it becomes really clear. [That’s] not always evident on a day to day basis”.

Community engagement

Stirling Council is on a journey to embedding relational approaches to community engagement. One example is their Champions Board which involves care-experienced young people in decision making processes, breaking down barriers between professionals, carers and young people. During the facilitated process citizens were not involved, which caused some disagreement in the group; some felt initial groundwork was necessary in developing shared principles among staff (for example between Community Planning and Children’s Services which were developing closer ties) before engaging with communities.

Further progress will now be focused on testing and embedding a new set of **place-based principles** in conversations with citizens and communities:

1. We want to do the right thing at the right time, in partnership with the children and families involved.
2. We want to work together better as partners.
3. We want to involve children, families and communities in developing and improving our work.

These are being adopted across multiagency teams, providing a new starting point for successful joint working based on shared values, not only among the place-based teams, but across wider services. There is recognition that partnering effectively with the third sector will be key in developing ways of working with communities which are holistic and responsive.

Learning

Funding was explicitly put towards creating a space for reflection through a process that was according to one Council employee “deep, philosophical, open ended and challenging to our own intellectual thoughts.”

For local public services, the concept of learning can often be constrained to professional development or data functions, or seen as one phase in a long 3-5-year cycle, rather than being at the heart of service design and delivery. The Council admit they have further work to do here and have invested in improving the use of existing data sets to understand the profile of provision and use of services, community need and risk; and in developing qualitative insight and future projection capabilities. Increasingly, staff from across services are coming together to learn and improve; with educational services drawing on their own pedagogical theory and social work exploring the value of supervision in supporting other staff. *Working Together* meetings of Heads and Senior staff from across schools and nurseries in the area are also providing

space for peer support and challenge and are increasingly involving young people in discussions.

Systems

The focus on systems change approaches was explicit in the support offered to Stirling partners. The Trust were already drawing on Lankelly Chase's Behaving Like a System and Collaborate and Newcastle University Business School's Whole New World publications to inform their own work and introduced these tools in these sessions. Crucial to the process's success was the appointment of a skilled systems change facilitator who also brought in the Cynefin framework (which helps makes sense of whether issues are Complex, Complicated, Simple or Chaotic) and ensured theoretical concepts were made applicable to the participants' contexts. All of this helped to build capabilities and knowledge of systems change theory and practice.

Partners in Stirling are on a journey to embed systems thinking with some employees working beyond their remit to build relationships and awareness of the 'bigger picture' while others are in a more 'practical and task driven' space. Cultivating systems leadership was understood to be key with elements already in place; a sense that permissions existed from senior staff to do things differently; support from national bodies (e.g. Education Scotland) to develop networks of system leaders; and development of a powerful overall purpose statement of "changing our way of working through disruption."

What's next

For Stirling

Engaging communities and third sector

Continuing to push and develop this agenda, through testing of place-based principles and other means; "If we're really talking about change, radical improvement, relationship-based practice outside and

building inside, we need to find people to build relationships with and the opportunities for doing so!"

Progressing the place-based approach

Reviewing the first two sites to learn from what's working/what needs improvement, particularly in relationships and ways of working among staff and with communities. Using this as an opportunity to spread learning to new sites and across wider services involved in the test and learn.

Revisiting the conversation

Once the technical integration of Children's Services is complete, potential to host another set of facilitated conversations with key stakeholders on principles, ways of working and embedding these.

Assessing conditions for systems change across Stirling partners

Taking a more systematic approach to assessing the progress on embedding key systems behaviours and principles could help guide where action is required.

For The Robertson Trust

Articulating and championing the approach

Being clear about the value of this approach, widening out and diversifying understanding of *what independent funders are for and what they can do*. Championing and sharing learning about the approach with fellow Funders and other support organisations (membership bodies, support agencies, consultancies etc.)

Applying learning to other programmes/areas

Assessing when places and programmes require focused support on elements of Human, Learning, Systems practice and apply learning or invest in reflective space.

Continuing conversations with Stirling

Maintaining an open dialogue with Stirling partners with the potential of supporting some of the actions above.

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