GOLDEN KEY LOCAL EVALUATION

SYSTEM CHANGE CASE STUDY: CREATIVE SOLUTIONS BOARD

1   Summary of Key Findings

The Creative Solutions Board (CSB) was established to review client cases where progress through existing channels had been unsuccessful. It is a multi-agency, multi-professional forum comprising board members who have the authority and influence to tackle blocks within the system in order to improve outcomes not only for those clients presented, but the wider complex needs community in Bristol.

The interviews confirm that, whilst development and implementation of the CSB has involved consultation and engagement with a range of partners, this is regarded as a Golden Key (GK) initiated intervention and something that would not have happened without their involvement.

A detailed referral process has been developed to bring together the necessary data and evidence for cases. This process, and the associated learning, have the potential to inform multi-partner consultation and review panels more broadly. The relationships between front line workers from a range of agencies that have developed through this process is a significant outcome in its own right and has helped foster trust, mutual understanding and a commitment to collaboration and partnership working.

Due to the relatively short period of time during which the CSB had operated before the impact of Covid-19, the small number of cases presented and the lack of opportunity for rigorous follow-up evidence of impact is predominantly qualitative and anecdotal. Despite this, interviewees expressed a firm belief that the CSB is having a direct effect on outcomes, not only for those clients whose cases have been reviewed in Board meetings but also those who had gone through the referral process (but not subsequently been presented), as well as the wider multiple complex needs population in Bristol.

All interviewees were very positive about their involvement with the CSB, noting a direct impact on the way they worked and engaged with others. Particular emphasis was given to the focus on client experience combined with systems flex/change. The language of 'systems flex' and 'system change' was felt to be a positive contribution, which could be directly attributed to GK.

Board members noted the importance of 'getting the right people in the room' and applauded GK for bringing people together around shared values and purpose. Interviewees commented that they were encouraged to meet each other informally between Board meetings, with several reporting strong relationships being built and sustained even during the Coronavirus lockdown.

The CSB is regarded as a cost-effective forum for system change. It has become a key element of the GK Transition and Legacy (T&L) strategy, having directly influenced the development of the GK Emergency Accommodation Team (EAT), Change for Good (C4G) and with a strong alignment with the move towards an Integrated Care System (ICS) in Bristol. It has also been included as an example of good practice on multi agency partnership working within a forthcoming book on safeguarding.

On the evidence of the success of the CSB so far, the GK Transition and Legacy group have approved an extension of funding and support until Summer 2022. The aim is to support the transition of the CSB to a sustainable forum for multi-agency partnership beyond the end of National Lottery funding.

2   About Golden Key and the Local Evaluation

Golden Key (GK) is an eight-year project that aims to unlock access to services for people with multiple complex needs (MCN), including homelessness, mental health problems, drug/alcohol dependency and criminal offending behaviour. Golden Key is a partnership of statutory and not-for-profit agencies across Bristol (including the NHS, police, probation, City Council, Second Step, Bristol Drugs Project, St Mungo's and 1625ip) who are piloting new approaches to service delivery and mobilising systems change to ensure a lasting legacy for the city and its most vulnerable residents. It is funded through the National Lottery Community Fund Fulfilling Lives initiative. A team at UWE, Bristol is working as local evaluation partner to capture evidence and inform practice throughout the initiative[1].

2.1   Why have we produced these case studies?

This case study has been compiled as one of a number of deep-dive investigations of systems change activity and impact in order to (a) understand in depth whether and how a sample of GK's systems change activity is driving demonstrable change and the relationship with outcomes for people with MCN; (b) draw out and capture learning from these activities to support enhancing GK's progress towards systems change. Projects were identified in consultation with the GK Programme Team and Service Coordinator Team (SCT) in order to provide a cross-section of approaches to systems change where there is emerging evidence of outcomes and impact. Case study reports are intended for illustrative purposes and should not be considered as a comprehensive independent evaluation of the activity. Insights from these case studies will feed into the Phase 4 local evaluation report.

2.2   Research methods and approach

The local evaluation takes a formative approach which aims to support learning and development in a shifting complex environment. It is influenced by 'realist' principles whereby we seek to understand the *mechanisms* through which interventions produce *outcomes* within particular *contexts*. We aim to capture multiple perspectives, differing experiences and unanticipated/unintended consequences. A mixed methods approach has been taken, with case studies based on a combination of semi- structured qualitative interviews as well as a review of associated secondary data sources where available.

Data collection was informed the GK Phase 4 Local Evaluation Framework[2], which was used to develop interview questions and structure the analysis process. The Creative Solutions Board (CSB) case study drew on the following evidence:

- 7 semi-structured video interviews, with 8 people including the CSB Independent Chair, System Change Facilitator, 2 x members of the GK Service Coordinator Team (SCT), 2 public-sector partners, and the GK Programme Team.

- Desk review of materials including the CSB Trello Board (accessed 11/12/2020); CSB Terms of Reference; CSB Interim Report (Feb 2020); CSB Referral Form (v4); Board attendance spreadsheet; Referral updates (Sept and Nov 2019); CSB Learning Log; public reports on Adult Safeguarding and Homelessness and Exploring the new world: practical insights for funding, commissioning and managing in complexity.

Interviews conducted between August and November 2020. Disruption caused by Covid-19 may have affected recall of activities prior to this period.

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[1] A selection of additional reports from the local and national evaluation be accessed at https://www.goldenkeybristol.org.uk/impact-evaluation-reports.

[2] Isaac, B., Bolden, R., Pawson, C. and Gasper, R. (2020) *Golden Key Local Evaluation Phase 4 Evaluation Framework*. Bristol Leadership and Change Centre, UWE Bristol, May 2020.

3 Background and Purpose

3.1 Background

The Creative Solutions Board (CSB) was established to review client cases where progress through existing channels had been unsuccessful. It is a multi-agency, multi-professional forum comprising board members who have the authority and influence to tackle blocks within the system in order to improve outcomes not only for those clients presented, but the wider complex needs community in Bristol.

It was inspired by a 'case conference' initiative in Plymouth and has been adapted to meet the specific requirements of the complex needs system in Bristol. It has been designed to incorporate GK principles and learning related to systems change. Documents provided by SCT member include further conceptual underpinnings around commissioning, complexity and safeguarding.

The Terms of Reference (TOR) include the following description of the background to the CSB:

> - Some people with complex needs are well served by Bristol's network of service provision and multi-agency working practices, developed over many years, supported by Golden Key, by shared learning, partnership working and collaborative leadership.
>
> - However, there is a small but increasing number who present a highly complex picture of needs and risks relating to mental and physical health, substance misuse, homelessness and offending. These individuals are some of Bristol's most vulnerable and excluded citizens.
>
> - The Creative Solutions Board recognises that this cohort requires a different, more creative approach involving many agencies and often commissioning responses too.
>
> - The following proposal has been informed by Plymouth's complex needs work, and the experience and learning from the Golden Key programme.

3.2 Purpose/aims

It was originally expected that discussion of cases at the CSB would generate new insights into what could be done to improve client outcomes. Over time, however, it has been recognised that Board members are best able to contribute by using their influence/authority to enable 'systems flex' and facilitate wider 'system change', whilst the 'solutions' are largely identified in advance through the referral process, which includes significant consultation between service coordinators, frontline workers from a range of services and lived experience from the Independent Futures group.

The CSB is "reserved as a 'place of last resort' for cases with high levels of complexity, where existing approaches are not adequate to meet need" (CSB TOR) and hence complements rather than replaces existing multi-professional review boards within the city. Board members are recruited for their ability to leverage change within particular parts of the system and there is significant emphasis on learning and building capacity for system change through the inclusion of a System Change Facilitator alongside the Independent Chair.

The CSB Interim Report (Feb 2020) describes the purpose/aims of the CSB as follows:

> - To meet and discuss in detail, individuals where the current response is not working and creatively action/plan a different solution, with the person at the centre
>
> - To use this individual learning to inform how the whole system might need to change and flex to deliver better outcomes.

4 Development and Implementation

4.1 Development/planning

Members of the GK Programme Team traced the origins of the CSB back to an attempt to present client cases to the Partnership Board (PB) in Autumn 2018. The aim of this was to bring to life the complexities and challenges in responding to the needs of particular clients and to use the insights and influence of PB members to facilitate system change. Given the seniority of most PB members and the packed nature of PB meetings, however, it proved difficult to assimilate and address the complexity of cases within the time available.

Following these meetings one of the PB members with strong networks in Devon introduced the GK Programme Team to the work of the Creative Solutions Forum in Plymouth as a good example of how a multi-professional board could help tackle blocks and barriers within the system. A member of the GK Programme Team, along with the CSB system change facilitator and two members of the Independent Futures group, visited Plymouth to find out more.

Formal planning and design began in March 2019. An Independent Chair was recruited in September 2019, who worked alongside a System Change Facilitator to coordinate and manage meetings. The first CSB meeting took place in August 2019, with the aim of meeting monthly and considering one client per meeting.

The interviews confirm that, whilst development and implementation of the CSB has involved consultation and engagement with a range of partners, this is regarded as a GK initiated intervention and something that would not have happened without their involvement. Whilst Bristol City Council had considered setting up a similar initiative in Spring 2019, they decided not to progress this when they became aware of GK's work developing the CSB and agreed to support this instead.

4.2 Implementation/practice

The CSB is a multi-professional forum that reviews cases that cannot be resolved through other channels. The aim is to use the expertise and influence of Board members to facilitate 'system flex' and 'system change' to improve outcomes not only for the client presented, but to remove blocks and barriers that may be encountered by other clients and service providers too.

The Board includes 10 senior-level representatives from 7 organisations, along with 2 members of the Independent Futures group, Independent Chair and System Change Facilitator. In most cases, attendance has been relatively consistent and sustained, with few examples of people deputising. The profile of members is summarised below.

Board facilitation – independent chair; system change facilitator
Bristol City Council (BCC) – Adult safeguarding; Adult social care; Housing options
Bristol North Somerset and South Gloucestershire Clinical Commissioning Group (BNSSG CCG)
Criminal Justice – Avon and Somerset Police; Community Rehabilitation Company (CRC)
Addiction services - Recovery Orientated Alcohol and Drugs Service (ROADS)
Mental health (MH) – Avon and Wiltshire NHS Mental Health Partnership (AWP); Second Step
Lived experience – Independent Futures x2

Prior to the Covid-19 pandemic the board met face-to-face on a monthly basis, with a total of 8 meetings from Aug 2019 to March 2020, during which 6 client cases were presented and discussed. Meetings were disrupted by the Covid-19 pandemic but resumed online from October 2020.

Board meetings are facilitated by the Independent Chair and System Change Facilitator and typically last for two hours (although this was reduced to 1.5hrs for online meetings during the peak of Covid-19).

Roughly two thirds of each meeting is given to reviewing a client case study, with the remaining third allocated to reflections and learning on system change.

Whilst the inevitable focus for board members are the monthly meetings there is considerable additional activity that occurs between meetings. The role of the SCT in developing client case materials is particularly significant and includes a multi-agency review and referral process completed with the support of the GK psychologist. Whilst only a single client case is considered at each meeting, given the aspiration to only bring 'last resort' cases to the CSB 2-3 client cases are in process at any time, with a 6-week window to work on them between meetings. This means that board meetings themselves represent just 'the tip of the iceberg' in terms of the work required to develop, present and implement CSB outcomes for each case.

A detailed referral process has been developed to bring together the necessary data and evidence for cases. This process has been refined over time in order to address 'the challenge of editing the complexity down to something concise for the board to consider'. This process, and the associated learning, have the potential to inform multi-partner consultation and review panels more broadly. The relationships between front line workers from a range of agencies that have developed through this process is another significant outcome in its own right and has helped foster trust, mutual understanding and a commitment to collaboration and partnership working.

The CSB is regarded as a cost-effective way of promoting systems change, informed directly by the needs and experiences of real clients. The only direct costs are staff time in developing and presenting the client cases (SCT lead and GK Psychologist), organising meetings (GK administrator), facilitation during Board meetings (System Change Facilitator and Independent Chair) and experts by experience (Independent Futures). Other contributions are either pro-bono or in-kind (Board members, non-GK frontline workers).

An interim review of the CSB was presented to the GK Partnership Board in Feb 2020, with regular updates maintained on a shared Trello Board, including evidence of system change. A review of learning and outcomes from the CSB is currently being conducted by the GK Programme Team.

5   Evidence of Systems Change

5.1   Change for people with multiple complex needs (MCN) and other service users

GK clients or a specific cohort of MCN individuals	Wider population of MCN service users in Bristol	Service users generally
YES	MAYBE	MAYBE

Due to the relatively short period of time during which the CSB had operated before the impact of Covid-19, the small number of cases presented and the lack of opportunity for rigorous follow-up evidence of impact is predominantly qualitative and anecdotal. The following examples of system flex, however, are recorded on the Trello Board.

- **Client 1: Social care, case remaining open** - Board member from social care agreed to keep their case open with a vulnerable client who had built a trusting relationship with their social worker but who was due to be allocated a 'pool' social worker due to a change of area. Maintaining the same social worker allowed the social worker and GK service coordinator to effectively, jointly support the client to succeed in accommodation which was initially felt to be too challenging for the client.

- **Client 3: Intentionally homeless** - Client refused offer of place in level one accommodation (finds this too difficult and unsafe) and was not declared unintentionally homeless, which is what had previously happened in a cycle over 6 years. (First time GK service coordinator has observed this happening over this period.)

- **Client 3: Flexible 4 hour window for housing placement** - System flex was achieved for this client in giving them a place in level 2 accommodation without them first having to do a

placement in level 1 accommodation. The client was given a 4 hour window to accept this placement, however this did not give staff enough time to locate the client who was sleeping rough at the time. After missing the window, the housing options team at BCC agreed to begin the process again (due to CSB agreement to house the client) and the window was extended to 48 hours. The client successfully took up this placement and services worked to keep them there for 6 months (ongoing), the longest period of time this person has been housed.

- **Client 3: 4 hour window** - Client offered level 2 accommodation, 4 hour window given to accept - challenging with client who professionals have difficulty finding and who can be hard to reach by phone.

- **Client 4: Effective information sharing** - Client was sleeping rough with high levels of self-neglect and what was felt by professionals to be deteriorating mental health. However, very little was known by GK or outreach services about the client's background and his previous history with MH services, who did not feel that MH support was appropriate for the client. The board agreed to sanction information sharing between MH and other services with the view to MH staying involved in this person's care. This information was shared and services can now work together transparently and MH services have agreed to stay involved with the client and work with the other services until the point where he is ready for MH involvement.

- **Client 5: Change in approach** - Anecdotal evidence from the service coordinator working with this client is that in a recent difficult incident (similar to those that have occurred in the past for this client), services have engaged with supporting this person in a completely different way (much less judgemental, much more proactive). The service coordinator feels that this is due to the involvement of the CSB with this person and is searching to find out why this has happened.

Interviewees expressed a firm belief that the CSB is having a direct effect on outcomes, not only for those clients whose cases have been reviewed in Board meetings but also those who had gone through the referral process (but not subsequently been presented), as well as the wider multi-complex needs population in Bristol.

The housing outcomes for Client 3 (outlined above) were mentioned by a number of interviewees as good examples of system flex. Several interviewees, including the Independent Chair and SCT lead, expressed the need to revisit a number of cases previously presented, in order to review progress, outcomes and potential for further system change.

5.2 Changes within and between organisations

Changes in individual staff (values, behaviours, beliefs, skills, knowledge)	Coordination/structural changes within organisations	Coordination/structural changes between organisations	Change experienced by Bristol citizens
YES	YES	MAYBE	MAYBE

All interviewees were very positive about their involvement with the CSB, noting a direct impact on the way they worked and engaged with others. Particular emphasis was given to the focus on client experience combined with systems flex/change. An interviewee employed by the Council said, 'looking at individual cases has led us to re-evaluate what we do', noting a tendency to engage with clients according to the structure of organisations and teams rather than client needs. Another interviewee noted that the CSB encourages members to question why things are done in the way they are and has fostered a willingness to support one another and try different things in order to 'unstick' issues for clients.

The language of 'systems flex' and 'system change' was felt to be a positive contribution, which could be directly attributed to GK. Two interviewees who were not otherwise involved with GK noted how they were endeavouring to introduce these concepts more widely within their workplaces and were liaising with key stakeholders, including commissioners, to review key performance indicators (KPIs) and

outcomes. One interviewee noted a shift in conversations around attitudes towards risk, with a move from 'blame culture' to 'shared accountability'.

Board members noted the importance of 'getting the right people in the room' and applauded GK for bringing people together around shared values and purpose, with particular recognition for the role played by Aileen Edwards (CEO of Second Step and contract lead for GK) in securing senior-level representation from across the system.

Acknowledgement was also given for the role of the Independent Chair and System Change Facilitator to building relationships and commitment amongst board members. Interviewees commented that they were encouraged to meet each other informally between Board meetings, with several reporting strong relationships being built and sustained even during the Coronavirus lockdown.

Reference was made to the energy within the group, with the Independent Chair noting their intention of creating an environment of 'playfulness', 'humour' and 'fun' that enabled people to transcend silos and experiment with new approaches. Another interviewee noted that they were a 'group of enthusiasts in the room' with a 'dogged determination' to make a positive difference to the lives of people with multiple complex needs. The commitment of Board members is demonstrated by a high level of consistent attendance and as one interviewee commented, 'there is never not a lesson to be learnt'. The CSB 'reminds senior leaders of the realities of practice, about real people with challenging lives… it reminds and grounds them'.

The CSB is regarded as a key element of the GK Transition and Legacy (T&L) strategy, having directly influenced the development of the GK Emergency Accommodation Team (EAT), Change for Good (C4G) and with a strong alignment with the move towards an Integrated Care System (ICS) in Bristol. It has been included as an example of good practice on multi agency partnership working within a forthcoming book on safeguarding.

6   Engagement with GK System Change Principles

The Phase 4 evaluation framework outlines nine key principles/assumptions that underpin the GK approach to system change. The extent to which these are evident within the (a) approach and (b) outcomes of the CSB are summarised below.

- PERSON CENTRED, ADAPTIVE SERVICES (High/high): the CSB is designed to support clients with a high degree of complexity, whose needs are not currently being addressed.

- SUPPORT WORK INFORMED BY PSYCHOLOGICAL THEORY (High/medium): GK psychologist directly involved in the case referral process prior to presentation at the CSB. Principles of psychologically informed environment (PIE) and trauma informed services embedded at all stages.

- SERVICES INFORMED BY MCN LIVED EXPERIENCE (High/medium): CSB has two Independent Futures group members, who are also directly involved in the case referral process. Client cases capture a richness of lived experience.

- FOCUS ON INTERPERSONAL RELATIONSHIPS (High/high): Building relationships is a key focus of the CSB and built into both the Board meetings as well referral process. Good evidence of system flex arising from improved relationships.

- STAFF SUPPORT AND EMPOWERMENT (High/high): Role of CSB is to champion and support insights from SCT and referral process.

- LEARNING AND REFLECTION (High/high): Significant time allocated to developing capacity for system change within each Board Meeting. Trello Board and Learning Log maintained by GK Programme Team and SCT enable capture of key learning/insights.

- DIVERSITY OF PERSPECTIVES & EXPERIENCE (High/medium): CSB designed as a multi-professional forum, with representatives from all sectors. Good gender diversity, although some way to go on racial diversity within the group.

- PARTNERSHIP WORKING (High/high): CSB designed as collaborative venture. Good engagement from senior-level representatives. Independent chair ensures that ownership sits beyond immediate GK team.

- WHOLE SYSTEM APPROACH (High/medium): CSB brings together all pathways to review cases, which creates important insights across the group.

7   Learning and Next Steps

7.1   Learning and insights

The CSB embeds much of GK's learning on systems change and offers a powerful forum for testing and sharing these insights with the wider complex needs system within Bristol. Through the interviews it became quickly apparent that each of the principles/assumptions outlined in the Phase 4 evaluation framework are actively promoted and enacted throughout the CSB approach and are key to any outcomes and impacts that arise.

Key themes, and tensions, raised through the interviews include:

- The importance of getting the right people in the room and building strong relationships between a consistent and committed group of members, whilst opening up the CSB to new members and broadening influence into new areas.

- The value of focussing on in-depth client case studies in order to bring issues to life, whilst ensuring that insights and actions can be applied to groups of clients who may be facing similar issues.

- The importance of GK in convening the CSB, ensuring appropriate high-level participation and preparing client case studies, whilst enabling the group to develop and evolve in response to changing contexts and the needs/interests of members.

- Ensuring a focus on learning and development of Board members and frontline workers around systems leadership and system change, alongside the delivery of tangible and sustainable outcomes for clients.

- The importance of empowering operational staff to work in a different way, whilst building the confidence and commitment of Board members to use their authority to support and sign-off actions.

- The potential value of opening up the referral process to other agencies, whilst ensuring sufficient resource and expertise to ensure that this is done in an effective way that does not breach data protection requirements.

- The need to demonstrate and share the outcomes and impacts of the CSB, whilst respecting client confidentiality and acknowledging the experimental and emergent ways of working.

A learning log collated by the SCT lead identifies the following criteria associated with engaging clients.

- Window of opportunity where the client wants support

- A trusting relationship has been established with a team/service

- Resources are available e.g. appropriate service response

The following learning/blocks are identified on the Trello Board

- Importance of consistency in relationship between client and key professionals

- Difficulties of systemic working with a client who is blocked by thresholds

- Domestic violence services: Thresholds & Family violence

- Thresholds not matching complexity of client need

- How easy it is for services to step back from a client

- Rigidity of services' responses to individuals

- Housing pathway - level 1 as condition, suitability, provider concerns

- Lack of long-term supported housing option in Bristol

- System designed to meet the needs of maximum no. of people, those with requirements for more tailored support falling from sides

- Blocks around dual diagnosis: MH and substance misuse discharging simultaneously

- Understandings of trauma: services needing to discharge due to non-engagement

7.2 Recommendations and next steps

On the evidence of the success of the CSB so far, the GK Transition and Legacy group have approved an extension of funding and support until Summer 2020. The aim is to support the transition of the CSB to a sustainable forum for multi-agency partnership beyond the end of National Lottery funding.

In order to support this there is value considering:

- The role of the System Change Facilitator and whether other groups (such as the Partnership Board and/or C4G) might benefit from a similar role.

- Reviewing previous cases in order to capture and disseminate evidence of impact.

- A process for reviewing CSB membership over time, including diversity and the induction of new members.

Should you have any queries about the GK local evaluation or feedback on this report please email Richard.Bolden@uwe.ac.uk.