

Evaluation of the Hartlepool Action Lab 2018

March 2017 - May 2018

Final Report 20th June 2018

1. Executive Summary

The research demonstrated that the work of the Hartlepool Action Lab has good alignment with the strategic outcomes of JRF / JRHT. The work addresses a wide range of poverty related issues and the approach enhances the ability of local people to take action in their communities. Equally, the success of the JRF team in developing and maintaining relationships across HAL1 and HAL2 cannot be overstressed. The bringing together of diverse groups, organisations and individuals has been one of the key factors in supporting the work.

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- All the projects met their initial targets and have retained some core group members, who have been instrumental in driving the work. However, progress has been slower than anticipated and the 'agile' method has proved difficult to sustain.
- Housing Heroes now has a designated lead organisation with the expertise to take the project forward, has secured funding and has a stable project team.
- Stronger Neighbourhoods has proved to be a useful forum which brings together strategic resource holders and community organisations, it has a committed membership but still needs to agree direction.
- Poolie Time Exchange started well and has secured external funding, but now needs development in terms of structure and governance. JRF have offered the assistance of an Advisor who can provide advice and support around funding.
- The development of new projects in HAL2 meant that the focus of the HAL shifted and there was less 'pressure' on the first tranche to deliver.
- The work of HAL1 could be more integrated with that of HAL2, although there are challenges in this as HAL1 projects are 'stand-alone' with a greater focus on service delivery, whilst the HAL2 projects work towards a single goal and pull together existing resource and staff. The energiser day was very successful in bringing together all the projects and the JRF team could consider in future using the Advocates across both tranches of work to enhance integration.

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- In HAL2 the projects have generated a potential financial benefit of £155,990 at the time of writing. Of that total the Benefits project generated £121,336, the Food project £2,092, the Energy project £11,548 and the Advocates £21,014.
- The JRF team have chosen to take a more proactive role in HAL2 and the Community Development Worker has been key to this. His input was highly valued by all participants but there were some concerns about how central the role had

become. This is also important considering that the programme has more than doubled in size whilst JRF staffing has remained the same. The JRF team could spend time reviewing the role and workload of the Community Development Worker and considering what resource could be put in place to support the work.

- Participants in the community research were highly positive about the training they received and their participation in the research. They found the experience rewarding and gained new skills and confidence. Several people mentioned the accreditation as something they valued.
- The community researchers were retained with the move into the HAL2 workshop, 15 of the 17 took part in the workshop.
- The majority of community researchers felt that the themes taken into the HAL2 workshop emerged naturally, but a small minority felt that the choice had been influenced by the JRF team.
- The findings of the community research were useful but lacked detail. Future community research could focus on a specific issue and use more in-depth research and analysis methods. With more training and support it might be possible for the community researchers to carry out such research, enabling them to gain more skills and experience.
- Participants in the two-day Action Lab training session were largely positive about the training and most felt they could deliver some or all of an Action Lab workshop with support. If such training were delivered again, it could be aimed at those who are more versed in the APS approach so there could be a greater focus on delivery, rather than knowledge of the content.
- The majority of participants in the HAL2 workshop felt that it was informative and that the trainers were skilled. The strongest theme from feedback was that the workshop gave an opportunity to meet with different organisations and individuals and hear new perspectives.
- The shorter, two-day, workshop facilitated the buy-in of some senior staff but meant that the concepts did not 'stick' as well with the participants who sometimes struggled to remember the content. The four-day HAL1 workshop was more effective in communicating ideas and building a cohesive team.
- The tighter framing of the workshop, and the targeting of staff who worked in relevant fields, meant that the work was easily aligned with participants own agendas and this greatly facilitated buy-in. For a minority of participants the framing was experienced as restrictive and counter to the APS method.
- The fact that HAL2 aligned itself with existing resource enabled a fast pace of development and the successful establishment of the three projects.
- The 'bottom up' approach of the HAL, and engagement of local communities and third sector organisations, was seen as key for larger corporate organisations. Overall the networking between organisations and individuals was valued highly by all participants.
- The pace of the work and the pressure to deliver could mean that communication was sometimes poor and the structures that supported action lagged behind the work delivery. This lack of structure and clarity about who was in the teams was confusing for some participants.

- Since the approach pulls together existing resources it can be difficult to untangle the impact of the HAL from that of work which was existent and ongoing. The JRF team have addressed this by only including financial benefits from additional work, such as the Food and Fuel Fairs. However, they could also explore ways to demonstrate the added input, for example, by identifying the level of switching pre-HAL2 or by examining take up on previous benefits campaigns.
- The work of the Food project would benefit from clearer goal setting and evaluation.
- The work of the Benefits project required specific expertise which meant that it was often difficult to find a role for community members within the group.
- The JRF team have been highly successful in bringing together diverse groups, organisations and individuals through the HAL. This work has been strengthened and broadened in HAL2 and was one of the strongest elements in the work.
- The JRF team have chosen to delay any decision about the delivery of further Action Labs and this would be a good point to consolidate the work of the current Action Labs. This could involve creating a more structured plan for the work, improving reporting and recording systems, reviewing the support needs of the groups, and the effectiveness and impact of the work so far.

The Agile Problem Solving Approach

- The HAL2 approach was much closer to the model used by Community Solutions in the US when addressing the issue of homelessness. Rather than developing new projects, it brought together existing work under the banner of 'Hartlepool's £1,000,000 Challenge', enhancing and maximising outputs.
- The strength of the 'movement building' has brought in new staff and volunteers who are not as familiar with the APS approach, which highlights the need for the JRF team to have a role as communicators of the concepts and methods.
- The HAL2 groups had different levels of buy-in to the approach. In the Benefits and Energy groups, where particular expertise was needed, work tended to adhere to existing practices.
- Many participants felt that the training could now be run using staff or volunteers from within the HAL and that the US facilitators were no longer necessary. This was confirmed by the US facilitators who felt that there is now enough knowledge about the APS approach in Hartlepool for the team to work independently of the US consultants.

2. Introduction

This report details the findings of an evaluation of the work of the Joseph Rowntree Foundation (JRF) and the Joseph Rowntree Housing Trust (JRHT) in Hartlepool. Since 2015 JRF/JRHT have been facilitating work in Hartlepool which has the aim of solving poverty in the town. This involvement in Hartlepool is long term and involves bringing together organisations and local people to develop locally based initiatives to address poverty. The work is informed by research with local people and uses an 'Agile Problem Solving' (APS) approach developed by a US consultancy 'Community Solutions' (CS). The APS method uses intensive workshops to bring together a diverse range of organisations and community members. Diversity is at the heart of the approach and the workshops encourage team working across established hierarchies. The approach is also based on three key 'principles' for creating change:

- *Social* - with diverse participants who understand and address the human elements that effect change i.e. the 'psychology' of all involved
- *Experimental* - with testing and iterative learning, with good information and rapid feedback loops
- *Action focused* - with measurable goals focused on the core problem, and urgent deadlines.

In the workshop, participants are introduced to a wide range of concepts and tools to help them in this endeavour and the workshops are consciously 'human centred' and inspirational. At the end of the workshop, participants develop 'solution focused projects' which are then taken forward by the group. The project teams set short term goals which are carried out within 100-day 'sprints' in order to keep pressure on the work and a sense of momentum. The whole process of workshops, project development and delivery is called an 'Action Lab'. The terms Hartlepool Action Lab or 'HAL' are used here to describe JRF's overall approach to work in Hartlepool, comprising:

- The relationship building by JRF with stakeholders in Hartlepool
- The HAL training event
- The HAL workshop event
- Solution focused projects which emerge from the workshops
- The contribution by JRF to other poverty related activities in Hartlepool (such as the Food Poverty Group and Financial Inclusion Group)

There have been two workshops to date, in 2016 (HAL1) and 2017 (HAL2), each of which generated solution-focused projects. HAL1 was initiated in 2016 and three projects emerged from the workshop:

- *Poolie Time Exchange* - provides opportunities for volunteering, connecting volunteers to people in need of low-level support in return for 'Poolie Pounds'. These can be spent on activities which help the volunteers to get into work or improve their health and wellbeing
- *Housing Heroes* - offers care leavers the opportunity to refurbish and eventually live in currently vacant properties

- *Stronger Neighbourhoods* - aims to strengthen local neighbourhoods in order to lessen isolation and increase the confidence and skills of local people to take action.

Both tranches of work were also informed by a period of 'community research', which was carried out before each workshop. This involved recruiting and training local people to carry out consultation in the town. The research was used in the workshop to inform discussion and decision making.

The community research, the APS method, the first workshop and the subsequent work of the projects was evaluated in 2017 and a full report is available on the HAL website¹.

HAL2 was initiated in 2017 after a period of review in which the JRF team considered the learning from HAL1. The second Action Lab was launched with a tighter focus on the financial aspects of poverty under the theme of 'affordability', and the community research was focused around this theme. In HAL1 the workshop took place over four days whereas in HAL2 this was split into two separate events. The first was a two-day workshop designed to train participants in how to run an Action Lab workshop. This was followed by a condensed two-day Action lab workshop. Just as in HAL1, three 'solution focused projects' emerged from the HAL2 workshop:

- *Energy* - a workstream focusing on saving local people money primarily by reducing energy costs through switching and increasing take-up of energy efficiency measures
- *Shopping and food* - a workstream focused on people reducing food bills in their households
- *Benefits* - a workstream focused on increasing the uptake of benefits for eligible households in a specific area of Hartlepool.

These three work streams were pulled together under the banner of 'Hartlepool's £1,000,000 Challenge', as the projects aimed to generate a combined financial benefit of one million pounds for people in low income households across the town.

The JRF team were also keen to find a more integrated role for community members in the HAL and have developed an 'Advocate' role for local volunteers, who receive training and support to engage with local people and refer to HAL2 projects. It was initially envisaged that the Advocates would work primarily with local people to reduce energy bills, however the role has expanded and Advocates work across the energy project and also refer people for welfare and benefits advice. This work is at an early stage, but the Advocates could be described as a fourth HAL2 project.

HAL2 was also initiated while JRF and JRHT were in the process of a Strategic Review. The review led to the development of clear outcomes for JRF and JRHT to which the Hartlepool work aims to contribute.

¹ <https://www.hartlepoolactionlab.org/research/>

JRHT / JRF Outcomes	
JRHT	JRF
<ul style="list-style-type: none"> ● More people are independent and well. ● More people are shaping our communities. ● More people improve their prospects. ● More people live in a decent affordable home. 	<ul style="list-style-type: none"> ● More people want to solve poverty, understand it and take action. ● More people find a route out of poverty through work. ● More people find a route out of poverty through a better system of social security. ● More people find a decent, affordable home.

It was clear from the evaluation that both the HAL1 and HAL2 projects have good alignment with the strategic outcomes of JRF / JRHT. On a practical level, the projects address a wide range of issues such as food poverty, housing, benefits take-up, energy costs, neighbourhood capacity and employment. More importantly, the approach engages with local organisations and individuals, providing invaluable experience, skills and resources to enable action around poverty in the town. The HAL2 approach has also been successful in facilitating better coordination between organisations across the town, strengthening networks and developing new links between organisations and communities. We believe that the evaluation demonstrates the contribution of the approach to the JRF/ JRHT strategic outcomes.

3. The Evaluation

The purpose of the evaluation was to review the progress of the work to date and assess both its effectiveness and impact, in order to inform future development. The previous evaluation of HAL1 examined four areas: the effectiveness of partnership building, the community research, the design of the Action Lab workshops and the development of the projects. In this evaluation we briefly track the progress of HAL1 since February 2017, then revisit the same thematic areas for HAL2. This examination provides an exploration of:

- The effectiveness of relationship building across both tranches of work, and the wider impact of the work across Hartlepool.
- The progress of the HAL1 projects, including the effectiveness and impact of the work, the role of APS and support needs one year on.
- Feedback from the HAL2 training workshop and the effectiveness of the training in equipping participants to deliver an APS workshop.

- Feedback from the HAL2 workshop, the effectiveness of the training and the impact of the APS methodology in Hartlepool.
- The effectiveness and impact of the HAL2 solution-focused projects, including support needs and learning for the future.
- Feedback from Advocates about the advocacy team, how they could most effectively be used and their support needs going forward.

We used a range of methods in the evaluation, including desk-based research, interviews and observation. We spoke to 35 people including the core JRF team, the Community Solutions facilitators, HAL1 participants, HAL2 workshop participants, HAL2 'training workshop' participants and Advocates. We also observed seven events, including meetings of the three groups.

The evaluation covers the period from March 2017 - April 2018, with a particular focus on the second Action Lab, which started in October 2017 with the Training Lab and Action lab workshop. This allowed us to observe the first '100-day sprint' of the second Action Lab and identify early wins.

4. Hartlepool Action Lab One

The work of the Action Labs in Hartlepool started in September 2015 with a period of relationship building by JRF staff. This was followed by the 'community research' in March 2016, where local people were supported to gather feedback in the town, produced as a report *'Conversations in Hartlepool'*². In June 2016, the US consultancy Community Solutions ran the first Action Lab workshop. This workshop was held over four days and participants were invited to develop a project which would address any of the issues raised by the community research. The participants identified three subsequent projects: *Housing Heroes*, which aimed to provide housing for young people leaving care, *Stronger Neighbourhoods*, which aimed to lessen isolation and strengthen local communities, and *Poolie Time Exchange*, a time banking project which connects people to provide support and improve skills and employability.

The work of these three projects is ongoing and was evaluated in February 2017. The evaluation found that the projects had largely achieved their intended outcomes, and that the Action Lab process was seen as a positive experience by the majority of participants. In the next section we assess how that early success has been translated into activity.

4.1 Poolie Time Exchange

The Poolie Time Exchange connects people with skills to those who need help in the local community. The volunteers at the project earn 'Poolie Pounds' by volunteering in this way, which they can then 'spend' on 'resources' such as trial job interviews, obtaining on-the-job experience, energy advice, CV development and training courses. By providing assistance to community members and supporting volunteers into employment, PTE aims to reduce

² The report can be downloaded at: <https://www.hartlepoolactionlab.org/research/>

the impact of poverty in the town. The project aims to support 1,000 people to volunteer by March 2020.

PTE started with a group of fifteen members after the first HAL workshop, but membership dropped to an active core of about seven after the first few months. In 2017, the group managed to secure £60,000 in funding from the Tudor Trust for two part-time workers for a period of two years. The funded staff were based at the Heart Centre, but changes in the lease meant that they have recently relocated to the Hartlepool Borough Council run Burbank Centre, the move presents another challenge to the project and could take time away from the development of the work.

The funding has given the project some security but at the same time the number of active group members has also dropped, and while there are nominally seven people involved in the group, not all are active or attend meetings. PTE also received funding to develop a database which lists the volunteers who are seeking activities and the opportunities available to people.

The project initially intended to work through 'hubs': local centres or organisations who would recruit volunteers and refer to the project. The project presently has four organisations who act as hubs in Hartlepool: the Belle Vue Centre, Hartfields, The Heart Centre and Hartlepool Carers.

4.1.1 PTE Achievements

The group is still functioning and has a high level of commitment from the core team members. They have been successful in securing external funding and are committed to taking the project forward.

Since it began operating, PTE has recruited 94 volunteers and facilitated 30 'exchanges' where volunteers have helped people in the community and earned 'Poolie Pounds'. Twenty volunteers have redeemed their 'Poolie Pounds', engaging in a range of activities including CV development, car hire, interview role play, a first aid course and salon treatments (to prepare for an interview). Two people have returned to full-time employment and a third has been recruited to run the cafe based in the centre. Other volunteers have become involved with other organisations on a voluntary basis since engaging with PTE.

There is also a high level of interest in the model, which has been well received by other organisations in the region. Funding from Thirteen Housing enabled the team to develop a database, and the housing association are now considering using a similar model.

4.1.2 PTE Challenges

While the project started well, setting up a base and establishing recruitment within the first 100 days of the workshop, over time it experienced a series of challenges. While the funding has enabled the project to put systems in place to support the work, the number of volunteers being recruited is lower than staff anticipated, and they felt it might take 3-4 years to achieve the goal set out in the original plan, to support 1,000 people by 2020.

One of the difficulties in progressing the project is that the work proved to be more intensive and time-consuming than was envisaged. In order to 'match' a volunteer with a volunteering opportunity, the volunteer might need to be DBS checked and supported to do the work. It was sometimes difficult to find suitable skills development opportunities for volunteers who had earned Poolie Pounds, and the staff sometimes found themselves having to invest time in individual volunteers, helping them develop CVs or giving support and advice.

'Matching people is difficult; sometimes you have someone with the skill... but they're in the wrong area. It takes a long time to do each match...get a DBS if needed, accompany people to the job. Each exchange can be intensive and time consuming. Sometimes one of the parties pulls out and then you lose the two of them.'

There were also disagreements between organisations involved in the project and, as a result, there have been changes in the organisations acting as 'hubs'. It was initially proposed that the hubs both recruit and assist in 'matching' volunteers to opportunities but this proved unfeasible and the burden of matching stayed with the core team.

'We are still operating but we could have done more, the other hubs could have been more involved and it would have been good to expand to other areas. We've not quite achieved what we wanted to achieve.'

Since much of the work was being done through the Heart Centre, the funding was channelled through that hub, which was a source of disagreement amongst the partners:

'Funding has got in the way, we should have applied to a pot of money that could be distributed across the hubs...'

These challenges have meant that project development has stalled and, in response, JRF offered the group a development day to identify solutions and a way to take the project forward. The lack of capacity in the group was seen as an issue and meant that ultimate responsibility for the work lay with the host organisation. With the closure of the Heart Centre and the move to Burbank, it was recognised that there was a need to formalise the governance structure of PTE and bring in new Directors with additional skills and expertise.

The people we spoke to felt that there was commitment from the members and a strong belief in the project, but when the second round of projects were initiated there was a feeling that the focus had shifted, and some of the necessary pressure had gone from the work:

'In essence we could have pushed it more, but everybody's busy and involved in other things, it's hard to maintain and people get teed off, but you still have to keep going...'

In terms of support needs, staff on the project felt that there was a need for more capacity on the team and that they also needed assistance in writing bids as funding from the Tudor

Trust was short term. JRF have offered the assistance of an Advisor to the JRF York Committee (a grant making body based in York) who can provide advice and support around funding.

4.2 Housing Heroes

The aim of the Housing Heroes project was to provide care leavers with secure, good quality housing. The ethos of the project was one of engagement and young people were consulted from the outset with the eventual aim of having them help budget for, design, refurbish and co-manage their own housing, in this way the young people would gain useful life and work skills as well as secure housing. Hartlepool was identified as a town with a high number of care leavers, and at the same time the large number of vacant and unused properties in the town had been raised as a concern by local residents in the first round of community research. The project had much initial success, recruiting several young people and working with them on visits to other housing projects, successfully achieving their 100-day goal.

The project group which came out of the original HAL workshop was relatively small and there have been changes in membership, but the group has sustained itself in size. They have representation from JRHT, Hartlepool Borough Council, Thirteen Housing Group, Central Estate Management Organisation and a number of local volunteers. The project has been successful but has taken much longer to establish than was anticipated and it is about nine months behind the original schedule.

4.2.1 Housing Heroes Achievements

Since February of 2017, Housing Heroes have written a comprehensive business plan and managed to secure a loan of £55,000 from the Joseph Rowntree Foundation, which has enabled them to purchase a house. A house has been identified and the project is moving forward and continuing to engage young people in the process. The project team has organised taster construction days and recently spoke at a young care leavers' event. Funding of £25,000 has also been secured to begin the refurbishment. The group was successful from the outset in engaging the support of Hartlepool Borough Council's (HBC) Children's Services and have consolidated this relationship over the last year. This has been key in ensuring recruitment and ongoing communication with young people.

Ownership of the project has also been taken by Hartlepool New Deal for Communities (NDC) Trust who have experience in the refurbishment and management of properties. The NDC were interested in taking on the project as it gave them an opportunity to work in a way which involved potential tenants at all stages of the process. The project has been successful in that it has sustained its membership and is moving forward and was well regarded by many we spoke to:

'I'm aware of the people behind it; they're solid and I believe in them. They're doing something quite tangible – bricks and mortar, renovating homes so people can go on and have their own home – they make a big difference. It's easy to communicate; is credible, well-organised and seems well-established.'

4.2.2 Housing Heroes Challenges

Whilst the project has secured funding and now has a formal lead organisation, one respondent described progress on the work as ‘painfully slow’. Initially it was assumed that JRHT might potentially lead the work, however the size and bureaucracy associated with the housing trust presented challenges to working in an agile way that enabled timely resolution of the many emerging issues. It became clear that JRHT would not be an appropriate lead for the work.

It also took time to secure loan funding for the house purchase and after exploring several options including social investment, the group found that the repayment cost was prohibitive and turned to JRF who agreed to foot the loan. Again, since this was a new arrangement for JRF, a large organisation with formal and sometimes lengthy procedures, resolving the legal and financial details was time consuming.

“... they keep presenting us with different versions of paperwork about the same thing, our solicitors say it is them that is the hold up.”

One of the challenges in project delays is sustaining the interest of young people, who often have a short window to be involved in such a project and move on. The project has four young people who are presently interested, but they may have to recruit from the next cohort of care leavers to complete the house. The process is complicated by the difficulties in communication, as contact is mediated by Children’s Services:

‘...although Children’s Services are on board they are very busy and it takes them time to get in touch with the young people and let them know about the project. Also, many of the young people are in education and have busy, chaotic lives and it’s difficult to keep in touch with them.’

The project members we spoke to were positive about the group and thought the mix of organisations worked well. Despite the less ‘agile’ nature of JRF, they had found them useful as a resource. The project had been able to access invaluable legal and financial advice, which they would have struggled without, and the NDC appreciated the opportunity that had been given to them by JRF to explore the idea of tenant involvement in refurbishment and management.

4.3 Stronger Neighbourhoods

The project aims to build community capacity in neighbourhoods across Hartlepool by bringing people together to lessen isolation and connect people to services and activities. It aims to increase the skills and confidence of local people to enable them to take action in their communities. Coming out of the HAL1 workshop, the project had nine members, including an independent consultant and people from voluntary and community sector organisations, funding organisations, a social housing provider, a local church and HBC. Nominally the membership has remained the same, but active involvement has dropped off and several of the people we spoke to had had little involvement since 2017.

In 2016, the project team chose the 'Brus' (part of the De Bruce Ward in North Hartlepool) as a target area in which to pilot the approach. During the 100-day sprint, they carried out a piece of community research in the area and ran a successful event in the locality, meeting all their initial goals.

4.3.1 Stronger Neighbourhoods Achievements

Although there has been a drop off in activity and engagement since the work in the 'Brus' area, at a recent development session run by the JRF team there was unanimous support for taking the project forwards. The team were committed to the continued work of the group, particularly in the context of reduced resources within the local authority and the demise of Hartlepool Voluntary Development Agency. The Wharton Trust had originally agreed to be the lead organisation but had withdrawn support. After some discussion with the JRF team they agreed to return as lead for the group in 2018. The commitment to taking the group forward perhaps reflects the value it has for workers as a forum for community-based organisations to network and share information around neighbourhood issues.

'...it brings together strategic resources holders and community anchor organisations and it's the only group that does that, which is really valuable.'

The earlier work in the 'Brus' area and subsequent discussion and activity have provided a model of community engagement that the team could take forward. The JRF team were recently successful in becoming one of the pilot areas for the Big Lottery 'Place Based Social Action' (PBSA) programme. This programme aims to create change by enabling communities, third sector organisations and the statutory sector to work together to create a shared vision and address local priorities through social action. With a stable lead organisation and support from the JRF team, the work could provide useful insights for the PBSA work.

4.3.2 Stronger Neighbourhoods Challenges

The Stronger Neighbourhoods group had a broader remit than the other two projects that came out of HAL1, and at the start not all group members had experience in community development, which made the work challenging. After the 100-day sprint, many of the members felt that the 'bias to action' approach of the Action Lab was not always appropriate when working with communities. They found it took time to engage with local stakeholders and starting the community research before key relationships were in place created unnecessary tensions.

'because of the 100-day goal, getting people out there was all done very quickly and one of the lessons was that persuading stakeholders can take time and if you rush it you can turn people off. They also found that the schools and churches needed more time as well. It just needed longer to get them on board.'

The project was also reliant on support from a local community development worker whose contract ended in November of 2017. His departure made it difficult to engage with local residents and co-ordination on the ground was hampered, making it harder to run events

and delaying the move into a new area. The temporary withdrawal of the Wharton Trust also delayed development, but the group have now identified two potential areas in which to pilot work and the Trust are helping to facilitate conversation with those communities.

There was also disagreement about the need for funding for the project. Some members feel that by building the project into current workstreams of partner groups and agencies, that progress can be maintained. There are others who think that the lack of resources, especially in relation to grass roots development work and project coordination, will seriously inhibit progress. Some feel that funding for at least a part-time coordinator is necessary to help drive things forward.

4.4 HAL1 and the Agile Problem Solving Approach

The evaluation of HAL1 found that many of the concepts of APS had taken root in the participants. The HAL1 workshop made a strong impression on participants, and even those who disliked the approach were able to recollect elements of the method. As the projects developed and faced increasing challenges it was often hard to hold onto the APS way of working:

‘...the goal, primary and secondary drivers and tasks, I use these a lot in my work. I know I’m using them I don’t know if others do.’

One worker talked about the difficulty of maintaining a fast and agile approach when confronted with the ‘real world’. This was particularly the case for the HAL projects, which were new, ‘stand-alone’ projects that needed development from scratch. While they did utilise paid workers from a range of organisations, the amount of practical work required to set up a new project often strained the capacity of the groups. Another participant felt that rather than trying to achieve a simple ‘target’, there were elements of the HAL1 projects which were trying to address complex, entrenched social behaviours for which there was no easy solution. While some of the concepts were useful, issues such as neighbourliness or lack of employment sometimes required more intensive solutions, for which the speed of the method seemed ill-suited.

Equally, whilst the first and second tranches of projects are nominally conceived as a single ‘Hartlepool Action Lab’, the work involved in setting up a second HAL workshop and instigating three new projects inevitably took some focus from the first HAL. During this period there was also a change in the manager of the programme, and the loss of a JRHT manager who had to withdraw from the project because of other work demands. At the same time JRF/JRHT was undergoing a full review under the leadership of a new Chief Executive in order to establish a new outcomes framework for the organisation. Whilst these developments may benefit the programme in the long term, there was a negative impact in terms of the input of senior management into the Hartlepool work.

However, HAL1 participants held onto some of the concepts, such as ‘failing forwards’. Equally, the role of JRF/JRHT as a facilitator, bringing diverse individuals and organisations into a room with a flattened hierarchy, was highly successful and memorable for the participants. The APS method was effective in giving initial impetus to the projects and

bringing a diverse range of organisations together, but it was hard to maintain in the long term.

The projects which emerged from HAL1 are moving forward and yielding results, but the process has been much slower than was anticipated. A lack of capacity on the ground, the complexity of the issues and the dilution of JRF input with the development of HAL2 meant that progress in the first three projects stalled at times. Stronger Neighbourhoods and Housing Heroes have the expertise they need to take the work forward, but PTE will need support to establish more firm governance and a formal structure. The JRF team recently ran an 'energiser' day, where all the projects were brought together to share progress and refresh the method, and this was highly successful. The team could also seek other ways to link the two tranches, potentially using Advocates across the six projects, channelling local people to PTE or attending Stronger Neighbourhoods events.

4.5 Key Points

- All the projects met their initial short-term 100-day targets and the groups are still functioning, but progress has been slower than anticipated.
- Housing Heroes now has a designated lead organisation with the expertise to take the project forward and a stable project team.
- Stronger Neighbourhoods has proved to be an invaluable forum which brings together strategic resource holders and community organisations. It has a committed membership but still needs to agree direction.
- Poolie Time Exchange started well, developing a database and recruiting volunteers to the project, but now needs development in terms of structure and governance. This support could be provided by JRF.
- Some felt that the APS method did not suit the nature of the projects. Issues such as 'neighbourliness' or a lack of employment sometimes required more intensive solutions for which the method seemed ill-suited. It has also been difficult to sustain in the longer term, particularly when faced with organisations that do not have such an 'agile' approach.
- The development of new projects meant that the focus of the HAL shifted, and there was less 'pressure' on the first tranche to deliver.
- The work of HAL1 could be more integrated with that of HAL2, although there are challenges in this as HAL1 projects are 'stand-alone' with a greater focus on service delivery, whilst the HAL2 projects work towards a single goal and pull together existing resource and staff. The energiser day was very successful in bringing together all the projects and the JRF team could consider in future using the Advocates across both tranches of work to enhance integration.

5. Hartlepool Action Lab Two

There was a period of review in 2017 when a new manager was appointed to lead the team and JRF was able to use the evaluation of HAL1 to reflect on the effectiveness of the first Action Lab and their role as facilitators. Informed by this period of reflection and the findings of the first evaluation, a Training Lab was delivered in October 2017 to equip volunteers, partners and JRF/JRHT staff to take the work forward. The second Action Lab workshop

was delivered with a tighter focus on three themes which aimed to tackle poverty in the town. These themes were identified through the 2017 Community Research; the cost of food, the cost of energy and the experience of the benefits systems. Participants identified three key goals to be carried forward after the workshop:

- Savings of £500,000 across 1,000 homes in Hartlepool by reducing energy costs by December 31st 2018.
- A reduction in the annual shopping bill of £200 per year for 150 households across 3 targeted neighbourhoods in Hartlepool by 31st December 2018. A total saving of £30,000.
- 100% of residents in the Jutland Road area of Hartlepool will secure an additional £470,000 through accurate claims of the benefits they are entitled to by 31st December 2018.

The 2017 solution focused projects were launched at an event in Hartlepool on November 27th 2017. Each project receives support from JRF in the shape of time from a Community Development Worker or an external consultant. The method ideally involves working on each solution in 100-day 'sprints', setting and refreshing goals at a fast pace as part of the Agile Problem Solving approach. Each team also receives a maximum of £1,000 (typically £500) every 100 days to enable their work.

In HAL1 there was a feeling that the community members who had been involved in the research and taken part in the workshop were not taken through effectively into the projects. In HAL2 the JRF team proposed developing a team of 'Advocates' or community members who could speak to local people about the HAL2 projects, focusing mainly on the energy project, and signpost to services. This has become in a sense the fourth project in HAL2 and we discuss the role of the Advocates later in the report.

HAL1 and HAL2 are supported by a full time JRF Community Development Worker, a half-time JRF team manager based in York, and by a local consultant who is employed on a variable monthly contract according to the needs of the work.

5.1 Relationship Building

One of the strengths of the first Action Lab was the way in which the JRF team effectively brought together a diverse range of individuals and organisations. The reputation of the JRF as an organisation facilitated this process but the JRF team were key in recruiting people to the programme. That work has been equally effective in HAL2. The team retained the majority of the organisations they had recruited to the work in 2016 and were able to recruit commercial companies such as Npower, Hartlepower and Virgin Money Foundation to the work. The diverse nature of the participants, and the connection between organisations and community members, was seen as the principle strength of the HAL by those we spoke to:

'...because we're a stand-alone project, to get together with other people, find out about the networks and get support. It's good to get an overview of all the needs, to hear others views and see how we fit together.'

'...the partnerships are really good, particularly the new ones developed with big companies/national energy providers like NPower.'

'I'm more aware of contacts and we network more now with organisations - hadn't realised they had a social conscience, like the water company.'

'There were lots of different people from different walks of life.'

The team had been able to successfully bring together organisations from different sectors, with very different working arrangements, and link them with community members. This connection with local people was seen as invaluable, particularly for larger commercial organisations, who often had developing community engagement programmes of their own:

'...it made me think about specifics of improving people's lives and the harsh realities people face.'

'...we can be quite removed from customers, but we want to change that. HAL2 awakened a sense and need to get closer to communities. We've extended the community funding, made it easier to apply and widened the criteria for who can apply want to ensure that people are consulted on how the funding is awarded and hope to get a lay representative on the panel and use feedback from community events and workshops.'

The work of the Community Development Worker was repeatedly mentioned as a key factor in bringing people together:

'..[he] has done an incredible job of getting it going and making the partnerships work.'

In both HAL1 and HAL2 the bringing together of diverse groups, organisations and individuals has been one of the key factors in supporting the work, and JRF have been highly successful in developing and maintaining relationships both in Hartlepool and beyond.

5.2 The Role of JRF in HAL2

The first HAL workshop and the subsequent projects were very much a pilot on the part of JRF. As this was the first time JRF used the APS method, the approach was open and the projects were free to choose a lead member at the HAL1 workshop. The JRF role was very much one of hands-off facilitation, where the groups were allowed to develop the work as they saw fit. A JRF staff member took part in each group in order to provide support and guidance and the team organised events such as the launch and the 100-day sprint event. Whilst this approach allowed for ownership and creativity, it also meant if projects were

struggling with capacity there could be a lack of progress, and team members could feel overburdened with work.

In HAL2 the team chose to be more proactive in co-ordinating the Action Lab. The solution-focused projects were led by JRF team members who carried out the function of chairing and administration. Overall the HAL2 projects were supported by a Community Development Worker, who has played a coordinating role, and the JRF team felt this enabled the rest of the group to use their skills to further the work and freed them of the burden of administration. For the majority of participants this worked well, having the JRF worker as the coordinator and lynch-pin of the work enabled them to focus on their areas of interest and ensured continuity and that the work moved forward.

'Having him as the worker on the ground has been invaluable, he has been coaching and coaxing... he has a real ability to network and connect people.'

The Community Development Worker was described by another participant as the 'glue' which bound together the work and provided continuity on the ground. Despite the effectiveness of the role there were some concerns from the JRF team about how central the role had become:

'I wasn't prepared to be the big red ball holder but ended up doing it so as to let people get on with the things they are interested in rather than the admin and organisation... I probably have a more active role than I want to have.'

Whilst the overwhelming majority of participants were highly positive about the role of the Community Development Worker, people were also aware that it had evolved to carry a large workload and that the groups would benefit from input from an experienced project manager:

'...he has done a good job, it's like herding cats – all the organisations have their own agendas. A bit more project management experience would be good... like we don't have milestones and I'm not clear on 100-day target ... don't know if we are on track or what we have achieved so far. No work plan for the next nine months. More project management experience would help to drive on activity. It feels like we are floundering sometimes...'

Some of these issues were a result of the 'bias to action' inherent in the method. The aim of APS is to ensure that projects move quickly into action rather than spend time developing detailed plans. Problems are resolved 'on the move' and some of these issues have been addressed at the time of writing. However, these concerns did highlight a need for the JRF team to reflect upon the role and workload of the Community Development Worker. This is also important considering the increase in the size of the HAL. In 2016, the programme consisted of three stand-alone projects with a community member as lead. The programme was supported by a part-time JRF manager, a part-time development worker and a consultant employed on a casual basis. There was also additional support from other JRF staff. With the initiation of HAL2 the programme has grown, including the Advocacy project

there are now seven workstreams, and while the JRF team have taken a more proactive role, staff capacity has remained the same. The HAL1 projects are now moving towards a more independent status but still need support and the resource of JRF.

Equally, the fact that the JRF team have chosen to take a more proactive role in HAL2, shaping the community research and playing a greater role in coordination, has presented a new set of challenges as highlighted by one interviewee:

'We were hoping the projects would end up being a bit more community led and not JRF led when they came out of the Action Lab. I think that JRF are currently very critical to the success or failure of the projects. I think their level of commitment is great and the fact that they continue to be engaged is great, but it also makes me a little bit nervous... if priorities were to shift at JRF, their strategic planning and direction, then these things may be left high and dry.'

In framing the work more tightly and taking a more proactive role in driving it, the work risks becoming dependent on JRF. In HAL1 development was often slow and it has taken time for the projects to find host organisations, but there was a strong sense of local ownership. Although the project teams were small and had high workloads, they were cohesive and participants were knowledgeable about the Action Lab as a whole. HAL2 participants had a lower awareness of the HAL as a whole, their knowledge of the work was often limited to their own area of involvement, and the 'bias to action' meant that the focus was on the work rather than the building of project teams. People were engaged and committed and doing the work but for some it didn't feel like a team.

This was not the case for the majority of participants - many welcomed the more proactive role of JRF, but it highlights a possible tension in the method. The 'bias to action' and the pressure to achieve goals can sometimes make it difficult to allow for the slow process of developing community ownership and leadership. The commitment of JRF to the work was very much welcomed by the participants and their long-term engagement was seen as key to its success:

'It's not a quick fix, people parachuting in. JRF have done the research, are here for the long term, have a base in Hartlepool and won't be off in 6 months.'

These issues may be in part due to the different nature of the work in HAL2, the programme is much broader, and the work has drawn in a wide range of individuals who did not attend the HAL2 workshop, so awareness is inevitably lower. We return to this issue later in the section when we look at the work of the teams and the 'Million Pound Challenge'.

5.3 Key Points

- The success of the JRF team in developing and maintaining relationships across HAL1 and HAL2 cannot be overstressed. The bringing together of diverse groups, organisations and individuals has been one of the key factors in supporting the work.
- The JRF team have chosen to take a more proactive role in HAL2 and the Community Development Worker has been key to this. His input was highly valued

by all participants, but there were some concerns from participants about how central the role had become. This is also important considering that the programme has more than doubled in size, whilst JRF staffing has remained the same. The JRF team could spend time reviewing the role and workload of the Community Development Worker and considering what additional resource and support could be put in place to support the work.

6. The Community Research

When the HAL was initiated in 2016, the JRF team commissioned 3Ps Consultancy to train community members and workers in 'participatory appraisal' to carry out consultation with local people to identify the key issues in the town. The research generated findings which were used to inform the HAL1 workshop. The researchers were very positive about the process, and the team agreed that it was a useful exercise which fulfilled the functions of recruiting community members to the HAL, giving them skills and expertise and gathering feedback from local people. However, the remit of the research was very broad and the findings generated a wide range of feedback which did not specifically focus on poverty. There was also a drop off in engagement from community researchers as many were not taken through into the subsequent workshop.

6.1 HAL2 Community Research

HAL2 was similarly kick-started with a round of community research, but this time the team gave the facilitator and the group a more defined focus and they were asked to explore the theme of 'affordability' in the town. The tighter focus was welcomed in that it was something clear that they could take to potential participants, it but also created different challenges for the research:

'There was much more of a focus on poverty this year, which in one sense was very welcome, but presented a few more methodological difficulties, for example the precise wording - do we use the term 'poverty' or 'making ends meet' or 'affordability' and which tools do we use. This was a very different piece of work from the previous year with some different types of tools and greater use of semi-structured interviewing.'

The community research training took place between May and September 2017 and 17 people took part. Approximately a third of participants were community members, a third JRF/JRHT staff and the rest were local staff in both the voluntary and statutory sector. The training was accredited and 8 participants received a certificate (Level 3 NOCN in Research Skills) at the end of the course. The research itself comprised 20 hours of face-to face training in participatory research techniques followed by a period of consultation, using sessions based in local groups and organisations. The researchers gathered feedback from 228 people.

6.2 Community Research Training

Overall the training was very well received by participants. They found the information useful and the pace of the learning good. The tone was informal with a wide range of

interactive techniques which was appreciated by the participants, as it gave them the opportunity to get to know other:

'The best bit was bonding with the other people. I made friends; there was a real team feeling.'

The participants felt the training gave them additional skills and the confidence to talk to community members. Yet, despite the positive response to the training, the sheer diversity of participants could present a challenge.

'It reinforced what I was doing and made me more aware. It was good training, but I had to really concentrate, towards the evening I was really exhausted, trying to be aware of all the different people it was such a diverse group.'

The diversity of the participants meant that they were at different points in their understanding. The facilitator was supported by the Community Development Worker, who was mentioned specifically by several community researchers as a key element of support both during the training and the subsequent research. Despite this, some felt there was a need for more structured support for individuals both during and after the training, given the volunteers differing strengths and needs:

'There are volunteers who can do some things and not others; it would be good if there was someone to get to know them well and suggest what they would be best suited to do; also, to be able to give them a pat on the back. Some people need a lot of pats on the back.'

One of the strengths of the community research is that the training is open to any community member, but that also has its risks. A more structured development plan for the recruitment, training and support of volunteers would enable the team to identify the strengths of their volunteers, and to support them to engage effectively with the programme.

6.3 The Research

The community research was a highly positive experience for those who gave feedback. When asked what they got out of the experience they all cited the opportunity to engage with local people and to listen to such a broad range of experiences and opinions:

'It was perfect...'

'We were able to reach out to disability groups, schools, colleges, a wide range of people. It was quite challenging, a lot of leg work, but I enjoyed it, contacting all the organisations.'

They felt they had contacted a broad range of people by working through local organisations, although some felt that they could have captured the opinions of more young people, and one person specifically mentioned the need for more feedback from Black and

Minority Ethnic communities. There was also the recurring difficulty of trying to achieve depth in the research, even though the focus had been narrowed, the theme of 'affordability' remained broad and the findings reflected this. Participatory appraisal was also used because it is an engaging way to conduct research with communities. Participatory appraisal is a quick and easy process and so people are more likely to participate, yet this also means that the information generated can sometimes be quite general. The community research trainer and JRF are aware of these issues and could choose to carry out research with a smaller number of selected respondents, exploring a specific issue. The community researchers are now more experienced and could be trained and supported to carry out research using more intensive methods, such as in-depth interviews or focus groups. This would also enable them to gain more skills and experience as well as generating more in-depth data.

Overall there was a sense that involvement in the research had been enjoyable and rewarding, the community researchers had learned new skills and gained confidence, and several people specifically mentioned the accreditation as something they valued.

6.4 The Community Research and the HAL2 Workshop

Moving into the workshop, the JRF team organised a session where the community researchers identified three themes from the research which would be taken into the workshop. Those we spoke to had divided opinions about the process. The majority felt that the themes emerged naturally, and as one person said they 'jumped out' of the data. Another researcher described the process of identifying the themes as a 'high'. However, not all the researchers attended the session and some who did were unsure how much they had been guided in the choice:

'Not to be too controversial, but I personally felt that 50% had been decided about which outcomes would be the focus. When we saw the three themes that came out we were a bit surprised. How did it happen?'

However, this was an issue for a small minority of participants. The majority felt that the right themes were taken into the workshop and this was reflected in the retention of community researchers with the move into the HAL2 workshop where 15 of the 17 researchers took part. There has been a drop-off in engagement as the HAL moved into the delivery stage, but some of the researchers have found a role as Advocates, something we return to later in the report.

6.5 Key Points

- Participants in the community research training found the content informative and appreciated the informal and interactive environment where they could get to know other participants.
- Involvement in the research was enjoyable and rewarding, the researchers learned new skills and gained confidence and several people mentioned the accreditation as something they valued.
- The community researchers were retained with the move into the HAL2 workshop: 15 of the 17 took part in the workshop.

- The majority felt that the themes taken into the HAL2 workshop emerged naturally, but a minority felt that the choice had been pre-determined, and they had been guided by the JRF team.
- On both occasions, the findings have been useful but have lacked depth. The JRF team could carry out more in-depth research using longer interviews or focus groups with a smaller number of selected respondents exploring a specific issue. The community researchers could be trained to carry this out, enabling them to gain more skills and experience.

7. The Training Lab

The aim of the training was to communicate the APS method and to equip participants with the skills to facilitate some, or all, of an Action Lab workshop. The training took place over two days in October 2017 with sixteen participants, including the three members of the JRF team and five staff from JRF/JRHT. Of the other eight participants, five had been community researchers and the other three were representatives from local organisations. The participants we spoke to were largely positive about the training.

‘The two days training was exceptional – insightful and challenging, really valuable. I read up on the SWITCH approach after the sessions and wondered how I could use it locally to address systemic issues.’

‘...it was good and relevant – I’ve been able to draw out the learning and apply it to my own work - failing forwards and the bias towards action. I’ve used it in an early evaluation of a new project to see what’s going right or not... I got lots out of it.’

Participants who had previously done Action Lab training were more likely to remember the content and could cite something they had taken away. Several spoke about the ‘failing forwards’ concept, which stayed with participants in HAL1, but they also cited a range of other concepts that they found useful such, as the ‘bias to action’ and ‘bright spots’. The participants also found the participatory aspects of the training useful, such as the ‘energisers’. They valued the flattened hierarchy and interactive methods, and some had used the techniques in other contexts.

Like the Action Lab workshops the training had a lot of content and was fast-paced, and as a result some participants struggled to retain anything useful from the day. Some in the core JRF team who had attended previous workshops gained less from the training. Their familiarity with the method, and the fact that they had several points of comparison with similar sessions, made them less convinced of its usefulness. The CS facilitators retained much of the basic content of the Action Lab workshop, introducing people to concepts and the approach, but this meant that there was limited time to practice how to deliver a session. If there were to be future training, the JRF team might consider designing a session aimed at those who are more versed in the APS approach, so there could be greater focus on delivery rather than knowledge of the content.

Despite this, the majority of the participants felt that after the training they would be able to deliver some or all of an Action Lab workshop, albeit with some help:

'I could probably do it and get away with it ... wouldn't be as good as what we had.'

'I'd feel confident to run a workshop. I'd need to revisit some of the material, but then I'm an experienced trainer so I don't know how others would feel...'

Community members were more likely to say that they would need support, or would prefer to co-facilitate, and nearly all the participants said they would need to refresh their knowledge as the content had faded over time. Two people raised the issue of support for community members and felt that volunteers should have access to some form of mentoring and support if they were to carry out roles such as facilitation.

Discussion about the training also raised questions for some participants about the need for US trainers at this point as it was felt that there was now enough expertise in Hartlepool to run training such as this, a viewpoint that was supported by the CS facilitators.

7.1 Key Points

- The participants we spoke to were largely positive about the training and most felt they could deliver some, or all, of an Action Lab workshop, with support.
- Future training could be aimed at those who are more versed in the APS approach so there could be a greater focus on delivery, rather than knowledge of the content.
- Some participants felt the training could have been run using staff or volunteers from within the HAL and that the US facilitators were no longer necessary.

8. The HAL2 Workshop

The HAL2 workshop followed the Training Lab after a one-day break. There were thirty-three participants in the workshop, five of whom had attended the previous workshop in 2016. Of the participants, fourteen were community researchers and three were JRF/JRHT staff. There was also representation from seven third sector organisations, four energy companies, a housing group and from Hartlepool Borough Council. We spoke to twenty of the participants.

The aim of the workshop was to generate action to tackle poverty in Hartlepool, with a more specific focus on affordability and financial hardship than HAL1. The workshop was led by two trainers from CS, and some of the sessions were co-facilitated by people who had taken part in the earlier two-day training. The themes; food, energy and benefits take-up, had been preselected during an exercise with the community researchers. Many of the participants had been invited because they worked in an area relevant to one of the themes. Participants were also asked to express an interest in one of the themes before the workshop.

The majority of participants were largely positive about the workshop, feeling it was well-organised and enjoyable, and that the trainers were skilled:

'The two trainers were really good though, it was well structured and really energising and really good at keeping people on track...'

'The facilitators were excellent, they had good energy and 'got me going'. It was good to get American facilitators, I liked the wide-eyed naivete and enthusiasm. It was a novelty.'

'It was important to enthuse people. You couldn't fail to be engaged by the Americans, as they were very enthusiastic. It gave everyone a boost, like a wow factor.'

Just as in the HAL1 workshop, the US style, and the experience of the facilitators in working with homelessness in a different national context, was thought-provoking and memorable.

'It was really interesting to hear about work in other national contexts, using the example of CS and homelessness in the US and thinking about what we could take from that. In the current climate, you have to think outside the box, to find ways of doing things that aren't too resource intensive but still get things done.'

The diversity of the workshop participants, and a 'flattened hierarchy', in which all have an equal voice, is a key feature of the method. In the HAL1 workshop this was seen as a positive feature of the approach, and this view came out even more strongly in HAL2. Participants liked the fact that they could meet with different organisations and individuals and hear different perspectives.

'...getting to know third sector organisations locally and having a better understanding of issues like debt and food banks.'

'There were lots of different people there from different walks of life and diverse levels of abilities, the volunteers got lots of learning.'

'They got the key actors together from different organisations; there was lots of buy-in. It's good to get talking, not work in silos, and to discuss the similarities and the themes. Not the 'we do this'. We've all got a part to play.'

The diversity of the group may have emerged more strongly as a theme in HAL2 because other aspects of the approach seemed to be weaker. Shortening the workshop to two days meant that some content was inevitably cut and the focus was more on goal setting. As one participant said, the approach was 'much more practical'. For some, this was a positive change:

'It was much less 'happy clappy', it felt much more focused and relevant. There was a huge amount of time spent explaining the concepts last time and some of it was familiar in that it was solution focused so it was preaching to the converted. It was much more practical and on point and was addressing the issues that we are actually working on.'

Having less time to communicate the approach may have had an impact on the depth of people's understanding, as some participants struggled to remember the content, and had a more general understanding of the method than the HAL1 workshop participants:

'It was quite a while ago, I'd have to look at my notes, there's nothing specific I can think of.'

'I can't remember a huge amount. I read the SWITCH book but can't remember a lot. It's about bringing people together, taking action and getting different people's ideas as a group.'

What many did seem to remember was the 'bias to action', this seemed to emerge more strongly from the second workshop and was mentioned by several participants.

'The bias towards action and being allowed to fail. Actually moving forward not just talking about it.'

The key aspect of the workshop for the majority of participants was the opportunity to come together with a wide range of people and organisations in a way that allowed for discussion and cross-fertilisation:

'I feel more connected to the community. It's vibrant and alive and it hit the mark for me, the research element is key, the focus on listening to people, without preconceived ideas - finding out what the issues are and looking at what you can do about them. I loved that, it was the right way round.'

'The training has given people a common purpose and a common aim and helped us to identify the projects. Its channelled some key partners and organisations to come together with a shared focus.'

'It is still there but have had to go back to limits and boundaries especially in my role. I made good connections with lots of different people like NPower and Hartlepower, who have volunteered their energy efficiency teams to help on a forthcoming Big Energy Saving Week – good to work with them on equal footing and share out work.'

'JRF are aiming to tackle poverty in Hartlepool and our social team are working with vulnerable customers in the area so it's a good opportunity to link with a respected organisation and provide additional services.'

Just as in the HAL1 workshop the approach seemed to appeal to some participants more than others. The workshop had less impact on professionals, who had encountered similar concepts before. Community members were much more likely to embrace the approach:

'The approach wasn't really foreign to me, having had Public Health and development training it's all about giving people the power to take control of their

health and come up with solutions. We have to be agile in our thinking at the moment, because it's about having to pool resources and work in partnership.'

'...everyone seemed to enjoy the training, but local residents were probably most enthusiastic. It was really good in that there was a good mix of people, from lots of organisations and the local community and it was set up as a round table so everyone was equal and had an equal say, that worked really well.'

Just as in the HAL1 workshop, the diversity of the group was its strength, but it also presented a challenge as people were at different levels of understanding and knowledge:

'There were lots of different levels. People were talking over others as they had more experience which made some people withdraw. It was all very quick though, so people got re-engaged in the next activity.'

'It hit a middle road. So, professionals probably benefited the least because they kind of thought they knew it already, even though it was different; and people with little experience were probably left behind. But we worked hard to have lots of different activities and did have something for everyone.'

The JRF team reduced the number of workshop days in part because many of the HAL1 participants had thought that four days commitment was too much to expect of staff who were already overstretched in their work. The team took the opportunity to use the other two days of CS time to facilitate the Training Lab, with the aim of building local capacity to deliver a workshop. Yet, despite this, many professionals still felt the two-day commitment was too great:

'...I've been to similar events in the past, we didn't need two full days, it was a lot for some people to give their time to when services are so busy.'

'.. the methodology seemed to be lots of time talking, we didn't need to do this – could have had it done and dusted in a day.'

'...the problem with the training was the time commitment, I was only able to go to the first half of the first day and the action planning on the second day, but the approach was really good, about applying good practice.'

The last quote highlights another issue. Just as in HAL1, there were people who only attended a part of the course:

'...it felt that there was more coming and going with some people coming for a day or popping in for a few hours, so they missed out on the process. Looking back, you realise it's a process and that every bit of it is important and you need to be at it all.'

It seems that this is an ongoing challenge when running an AL workshop. Busy professionals will resent the time commitment, and attendance was not full even when the

workshop was shorter. The shorter workshop was successful but did not seem to be as effective in actually embedding the approach in people's awareness and practice. To reduce the time commitment any further would exacerbate this challenge.

As in the first HAL workshop, a small minority of participants, all professionals, felt they learnt nothing new:

'It was nothing different really, a glorified brainstorming session, the facilitators wanted to sell the methodology.'

'I really don't know what it's about. It was hyped-up, American, really I suppose it was about having a can-do attitude and invigorating interest, but we already have that.'

Others were still positive but had felt confused about the approach within the workshop, for many professionals starting with an idea, rather than planning on the basis of the resource available was difficult to grasp and caused some disagreement in the planning section:

'I struggled with the concept really, the looking at what you want to achieve first and then thinking about resources. I couldn't get my head around how you would know what you could achieve if you didn't know what resources you had to start with. Facilitators had to keep reminding us to look where we wanted to go first. As a business we have to look at resource.'

Another participant felt that the disagreement was indicative of the fact that the workshop was more 'framed' than the first time:

'People had already decided before the AL what ideas they wanted, so they missed out on the random ideas, the crazy ideas and different ways of thinking... Last year there was more emphasis on different ways of thinking and on believing that everything was possible... There should have been more freedom.'

Equally, the shorter workshop and the increase in focus also meant that for much of the two days, people worked in their chosen groups, rather than as a whole:

'There was little cross-fertilisation. It would have been good to share and have some overlap.'

Despite these issues, the shorter workshop did facilitate the buy-in of some senior staff who would have struggled to attend a four-day event. Equally the tighter framing, and the targeting of staff who were focused in the selected work areas, meant that participants could immediately see how the work would 'fit' with their own agendas:

'...we hadn't really understood the level of commitment the first time around and so it came as a shock. Now we know that it involves a lot of work, but it can be aligned with what we are doing anyway.'

The three solution-focused projects were shaped in the workshop and the project groups were formed. We can see in the next section, as we examine the work of the groups, that one of the strengths of the way in which HAL2 was designed was that the projects could be easily aligned with the existing work of organisations. In the next section we describe the work of the three projects, integrated as they are into the one 'Million Pound Challenge'.

8.1 Key Points

- The majority of participants were largely positive about the workshop, they felt it was well-organised, informative and the trainers were skilled.
- The strongest theme from feedback was that the workshop gave an opportunity to meet with different organisations and individuals and hear new perspectives.
- The shorter workshop facilitated the buy-in of some senior staff but meant that the concepts did not 'stick' as well with the participants, who sometimes struggled to remember the content. The four-day workshop was more effective in communicating ideas and building a cohesive team.
- The shorter workshop meant that people worked in their chosen group for a greater proportion of the time, so there was less cross-fertilisation between the groups.
- The tighter framing of the workshop, and the targeting of staff who worked in the selected areas, meant that the work was easily aligned with participants own agendas, and this greatly facilitated buy-in. For a minority of participants, the framing was experienced as restrictive and counter to the APS method.

9. The Hartlepool £1,000,000 Challenge

The workshop generated three solution focused projects, which had the aim of saving money and increasing income for those living on low incomes in Hartlepool: an 'energy' project, focusing on 'switching and energy conservation', a 'food' project, focusing on reducing food waste and food bills, and a 'benefits' project, which focused on the uptake of benefits in Hartlepool.

The work of the three HAL2 groups is carried out under the banner of the 'Million Pound Challenge'. The three groups aim to contribute to a total saving of a million pounds by December 2018. Combining the work under this strapline was a simple and successful way to communicate the work. The size of the challenge was both daunting and exciting, fulfilling the brief of the APS method to choose goals which create both a little discomfort and drive in the participants:

'...when he said it, I thought he was insane but then at an event the other day there were twenty people who were seen by the benefits advisors and I know they helped them with thousands and thousands in unclaimed benefits and that was just one afternoon, so you can see that it's possible.'

The work is delivered through a range of activities, including 'Food and Fuel Fairs', open events, based in local centres, where representatives from the three groups provide advice and support around energy switching, food and shopping, and welfare rights. The work also

involves outreach sessions and talks with organisations, as well as food distribution and cookery demonstrations. We describe the work of the groups in the following sections.

All contacts are recorded and any potential savings are identified, such as energy savings or additional welfare benefits. The team intend to follow up on contacts to see if the potential savings are realised by, for example a successful energy switch or benefits application. The team will then use this data to achieve an actual figure for financial benefit. At this point in the work we only have data for potential financial benefit and we specify 'potential' benefit throughout the report. As at the 8th of May the potential total financial benefit across the work was £155,990. The Fairs initially attracted small numbers, but attendance has improved as the fairs have become more established and there have been a total of 200 attendees across all events. Those who have attended got assistance which potentially yielded large savings or income gains, especially in the take up of benefits. The team have reviewed the events and have changed venues and the style of the event, adding more entertainment and activities such as cooking demonstrations. One of the most successful events was at Hartlepool library, which has a good footfall, and tying the Fair in with a well-used venue was effective.

One of the key strengths of the approach is that that the themes taken into the workshop were closely aligned with much of the work going on in Hartlepool. For example, the 'Hartlepool Financial Inclusion Partnership' was officially launched in July 2015 with the aim of bringing together public and third sector Advice and Guidance agencies, and there was also Hartlepool Food Network in development at the time of the workshop, which would redistribute surplus food to community organisations working with people struggling to make ends meet. Equally, many energy providers have been developing their own community engagement programmes and aim to encourage 'switching' and find ways of helping those struggling on low incomes. The fact that there was already capacity in these areas significantly helped the work. In a sense the HAL2 is a coordinating 'umbrella' organisation, which brings together disparate streams of work across the town and enhances outputs by recruiting new staff and community members to the work, and developing new channels of activity, such as the Food and Fuel Fairs.

'I don't know if it was because we were ripe to make that move but we have no capacity at the moment, we don't have any money, but we did have a plan for what we wanted to do and JRF provided a space for it to happen.'

The pre-existing work also contributed to success in that senior staff could quickly see how their work could be aligned with that of the HAL and were more easily persuaded to come on board. There was buy-in from senior staff in statutory and commercial organisations who were convinced by the practical nature of the work, the alignment with their own goals and by the work of the HAL1 groups, which demonstrated the commitment of JRF to working in the town. This gave the JRF team access to staff who were working in the areas, and we will see when we look at the work of the groups that they have managed to bring a wide range of public and third sector staff on board, working towards shared goals.

The HAL2 approach was much closer to the model used by Community Solutions in the US when addressing the issue of homelessness. The US team chose the highlight banner of '100,000 Homes' and worked with a wide range of organisations to create a 'bias towards action' pulling together and enhancing existing work.

'With HAL2 we've become more like CS were in the US in relation to homelessness, from the start we've been acting more in a facilitative role to enable solutions. Our role is as coordination and to provide leadership.'

This has been evidenced by a 'snowball effect' in the work. During the period of the evaluation there was ongoing change in membership of the project teams, and new organisations and volunteers were often brought on board, which made it difficult at times to track the work. It did demonstrate strongly that the 'bias to action' was in place and 'movement building' was a strong element of the work, as new organisations were being pulled in as development progressed. Since the approach pulls together existing resources, it can be difficult to untangle the impact of the work of HAL from that of work which was existent and ongoing. The JRF team are aware of this issue and have addressed it by only tracking work which emerged from the HAL, such as the food and fuel fairs and the work of the Advocates.

It is worth noting that in our interviews with participants, it was sometimes difficult to identify specific team members. Some people were identified with one work stream, particularly if it was related to their job, but others saw the work of HAL2 as a whole as the 'Million Pound Challenge'. There wasn't a strong project group identity as in HAL1, and participants often identified with specific pieces of work, rather than as a project team member. This meant that when we asked about the impact of a particular project they often spoke about the whole challenge, referring to food, fuel and benefits.

9.1 The Food Project

Aim - We will reduce the annual shopping bill by £200 per year for 150 households across three targeted neighbourhoods by 31st December 2018
Total 'saving' £30,000

The aim of the food solution focused project is to help alleviate food poverty in the town by addressing how people shop, the cost of food and access to food, and how to prepare healthy and affordable food. The group recognised the increasing use of food banks and that food poverty was a major issue for local people. After the HAL2 workshop, the project started out with eleven members and there are now six or seven active members. The group has more potential to explore creative solutions, since it is not tied to addressing fixed systems like the benefits system or energy switching. This was reflected in the plan which emerged from the workshop, which was very broad and included over thirty ideas around food saving, growing and cooking. Since the workshop the group has narrowed the list to three main areas of activity:

- Cooking good quality meals on a budget.

- Hosting community-based pop-up markets.
- Boosting people's confidence and capability to shop online.

The project has overlap with the Hartlepool Food Network, which operates to distribute food to local organisations and there is much overlap in the membership of the two groups.

9.1.1 The Food Project - Activity and Progress

The work has been carried forward in a range of ways including:

- Using an online comparison website to show people how to compare the prices of different supermarkets for various goods. In the longer term, the project aims to form shopping groups so people can join together to meet minimum online orders and share delivery costs.
- Developing bulk buying so that people can club together to buy in bulk and get discounted prices. The aim is to use the Belle Vue Centre as storage to facilitate deliveries and collection.
- Opening a 'community fridge/freezer shop' at a local venue so that fresh and frozen food goods, which could not normally be distributed, can be stored safely. Using volunteer drivers to distribute it to community organisations.
- Providing recipes and food demonstrations at local events such as how to feed a family of four for £5. The project has produced a recipe book and compiled a list of 'everyday essentials'.
- Setting up a slow cooker scheme, where people who have signed-up and attended two HAL sessions can receive a slow cooker and 'store cupboard essentials'. They also have published a recipe book using recipes collected from local people.

In the last few months the project has secured 136 members for the Food and Fuel Club; given away 34 slow cookers, store cupboard hampers and recipe books and held seven Food and Fuel Fairs attended by 200 people. Hartlepool Food Network has secured premises, set up a bank account and taken part in several events. As at the 8th of May To date, the project has potential savings of £2,092. The project has a one-year goal, but did not set a target for the first 100 days. Out of the three projects, it is perhaps most difficult to quantify the savings generated.

9.1.2 The Food Project Challenges

The drop off in membership after the workshop was a challenge for the project members. One participant described 'lots of momentum and enthusiasm' at the end of the workshop but felt that some people had become over-committed and others had left, which had an impact. Another talked about the energy having 'dipped a bit':

'There's more to it than you think and you have to be ready for it – it can seem a bit big, frightening even and it can put people off.'

Several of the people we spoke to were very positive about the HAL but had dropped out of the group because of capacity issues; small local organisations didn't have the capacity to send a member of staff to be involved in the group. The group had managed to bring in new people, but in effect there seemed to be a shifting membership, as people had the freedom to come in and take part in activities or to generate new activities. This meant that there was great flexibility in what the group could do, people were enabled to pick up ideas and simply run with them, one group member spoke about:

'... meeting recently with allotment owners who say they have a lot of extra fresh food. I'm seeing if they can bring them in.'

This reflected a sense of 'moving into action' that was paramount in the work. At the same time this pressure to act and to deliver could mean that communication was sometimes poor, and the structures that supported action lagged behind the work. This lack of structure and clarity about who was in the team and who was responsible for the project was confusing for some participants:

'...lots of people are cc'd into emails but don't attend and a couple of people are being asked to do a lot of things...it doesn't feel like an actual team. If you're not at a meeting you get given a task and then can't do it as you're not available on that day.'

Equally, whilst the Community Development Worker had been very supportive of volunteers, some felt that the scale of the work needed more dedicated support for community members who were involved in the HAL.

'...working with volunteers is a very different way of working; they need to be managed and should get something back and they aren't.'

'I feel a bit that people will be left behind. Unless you're really up for it - if you're not well or are socially excluded-you can be left out. I feel guilty about it, but I don't have the emotional energy.'

Most of the community members involved were positive about their role, but one participant felt their work as volunteers should be more acknowledged, and community members should always be credited for their work in the HAL. The sense of not having a coherent team and moving so quickly also meant that decision making could be unclear, as decisions were sometimes made 'on the go' as events unfolded. Equally, whilst the JRF worker did try to get feedback from the staff after events, a minority of participants felt there needed to be a more thorough and honest evaluation of the work and how it might be improved.

'I don't mean to get bogged down in evaluation, but there's a need to look at what worked and what didn't work...they need to come back and make it simple, ask people what they want, see the results and evaluate this.'

Another challenge for the food group was to assess the impact of the work. When asked about impact, most people referred to the whole challenge and the savings that would be made. One person pointed to the cookery demonstrations, but struggled to say what impact the work had:

‘...people always ask for the recipes at the Food and Fuel Fair, and these give the costs, so that might make a difference.’

Overall there was a need for the group to more clearly define its goals and look at how they might assess impact over the year.

9.2 The Benefits Project

Aim - We will ensure that 100% of residents in the Jutland Road area will secure £470,000 through accurate claims of the benefits they are entitled to by 31 December 2018

The project aims to reduce poverty by increasing the uptake of benefits in a specific area of Hartlepool. There were nine people in the project group coming out of the HAL2 workshop, but over time the project has come to be largely owned by the West View Advice and Resource Centre advice team with input from JRF staff and Thirteen Group.

The project had a working 100-day plan coming out of the workshop which included using evidence to identify an appropriate neighbourhood and to engage with 25% of residents by the 7th of March 2018. The project also aimed to increase the knowledge and awareness of frontline staff across Hartlepool so that they would refer claimants to appropriate sources of advice and support. The initial plan also included the creation of a volunteer ‘navigator’ role, whereby volunteers would be trained to support claimants to find their way through the Benefits system. Within the first 100 days of the launch the Jutland Road area of Hartlepool was chosen for the project as it has a high level of deprivation and limited engagement with services. There are 500 households in the area.

9.2.1 The Benefits Project - Activity and Progress

Members felt that they started well, taking the momentum from the workshop into the group. The Benefits campaign was launched in the Jutland Road area in mid-February with an advice session where 20 residents attended. There have been several subsequent events, including a drop-in session attended by approximately twenty-five people, a dedicated carers event and a Benefits event at Jutland Road Community Centre. The project also has fortnightly surgeries at Jutland Road Community Centre and at Golden Flats School. West View Advice and Resource Centre advisers book-in people who contact the centre for advice, others are directed from events, and advisers from the centre are also contacting everyone from the catchment area with whom they have had contact in the previous year. The team plan to move to weekly surgeries, as they anticipate that demand will increase through word of mouth.

The JRF team are keen to use personal, door-to door, contact on the estate, as they recognise the challenges in engaging the residents, but this has been delayed by concerns within the project group about risk for staff and volunteers.

Through this work, the group has achieved a potential financial benefit to date of £121,336.

In developing the work of the Benefits group, the JRF team have been able to capitalise on the presence of an existing network the 'Hartlepool Financial Inclusion Partnership'. The partnership brings together advice and other agencies across the town and had experience of running benefits take-up campaigns:

'...it has a lot of overlapping membership with Hartlepool Financial Inclusion Partnership, it's a group which shares information, provides training and is developing an action plan around financial inclusion....if it works it could be replicated in other areas, it doesn't have to be led by JRF it could just come under the HFIP banner.'

The work of the Benefits project was very familiar to staff already involved with the Financial Inclusion Partnership, and they were easily able to align the work with similar events which they had been running in the town since 2015. The familiarity of the work also made it easier for local staff, who knew what the role involved:

'Last time [HAL1] it was really hard work; this time everyone is interested and passionate, know what they're doing and how to do it. Last time not everyone was on the same wavelength.'

The challenge for this HAL2 project group was in achieving the target rather than in developing the work.

JRF have also used the Benefits project to explore themes related to their strategic outcome - 'More people find a route out of poverty through a better system of social security'. A JRF 'Benefits Learning Project' will track the work of the project throughout 2018. This team is taking a census approach, closely tracking the households in the Jutland Road area in order to identify the level of financial income generated through take-up of welfare benefits. The Benefits Learning Project will gain a full picture of the target households, including their experience of claiming benefits. The learning project will ensure that the work is fully monitored and evaluated, and will pull out the learning from the work at the end of 2018.

9.2.2 The Benefits Project Challenges

One of the challenges of the Benefits project was that the work required specific expertise and advice work is regulated. This meant that there were few options in terms of who could deliver, and that it was often difficult to find a role for community members within the group. This was reflected in the final make-up of the group which was largely comprised of welfare rights professionals with support from the JRF team.

'... it's basically WVARC [West View Advice and Resource Centre], Thirteen are involved and obviously JRF. WVARC lead on delivery, the membership was predictable really because WVARC was already doing the work.'

'It's harder for people to contribute this time I think, there's a lot more technical information, how people can be involved is much more limited.'

'There's not really a role for a volunteer in the benefits group, I listen to what people are telling me in the community and I can bring examples from what I'm hearing back to the group. I do bring issues but most of the work is done by the professionals because it needs a specific expertise and you need to be qualified and trained to do it.'

The need for specialist knowledge and skills, and the presence of existing work, meant that the Benefits group seemed to operate more as a stand-alone project. The staff attended events and worked alongside other group members but:

'They don't really have overlap with the other two groups- they just piggyback onto their events to give advice and reach people.'

Some of the benefits advisors we spoke to at events had very little knowledge or awareness of the HAL or JRF, and simply attended the event as part of their usual work. This was not a problem in itself, as the APS method aims to draw in a wide range of participants, many of whom will not have attended the workshop. There was also a great commitment to the work and enthusiasm from the advisors. However, there was at times a sense of 'business as usual' in the work of the benefits group, with the lead organisation using their existing techniques rather than exploring different approaches. For some in the group the creativity and agility of the APS method were missed:

'...it matters that lots of people don't know the APS method. It matters to me because last time it was so important to look at new ways of doing things, but everyone is doing the usual approach.'

This may become an issue as the project progresses, whilst many projects may gather success as they develop, in the case of benefits take-up, the progress may slow, as the projects exhausts the fund of clients who are easier to engage with:

'...still have nine months, although we'll have reached those easier-to-engage first and this may get harder.'

This participant also missed the pressure of having a target for the 100-day sprint:

'We have the enthusiasm and passion, but not the push – the goal at the end of the year seems a long way off so we may feel it later; we didn't have the 100-day goal.'

The project has been successful in the first three months of operation, achieving some high projected financial benefits and drawing in a network of advisors for the additional events. However, the JRF team are aware that as the work progresses, there may be a need to use more 'agile' approaches in order to engage people who are more reluctant to attend events.

9.3 Energy Group

**AIM - We will save £500,000 across 1,000 homes in
Hartlepool by reducing energy costs
by December 31st 2018**

The project aims to reduce energy poverty by helping people switch to cheaper energy or water tariffs, or by introducing a water meter or a smart meter. The work also involves matching people with funding for home energy efficiency measures, such as insulation or a boiler. The project also set itself a 100-day target of carrying out 200 activities (switches, insulated homes or smart meter connections) by March 7th 2018.

There were ten people in the project group coming out of the HAL2 workshop, but there has been drop-off and the group now has an active membership of six or seven people, including four representatives from energy companies and two third sector organisations. The group meet monthly, with some staff, particularly those outside Hartlepool, attending virtually or by telephone. The project was largely co-ordinated and led by the Community Development Worker, and project group members were very satisfied with the level of support he provided. On being provided with mobile internet by the worker so she could demonstrate online solutions to a local group, one member said '*I felt like I was flying*'. The comment gives a flavour of the positive response of all the project groups to the work of the JRF team.

9.3.1 The Energy Group - Activity and Progress

In addition, the project has trained volunteers who are now discussing switching with local people and using computer tablets to show the process and demonstrate potential savings. The work is largely delivered through the Food and Fuel Fairs, but they also have run stalls in shopping centres and local venues and done outreach in local schools. To date the project has generated a total potential financial benefit of £32,562, which is comprised of £11,548 from general project activity and £21,014 from Advocate activity (Advocates largely work within the energy project). Ten switches have been successfully completed.

As with the other HAL2 projects, there was pre-existing work in the area of energy; many of the energy companies had staff who were working around community engagement and fuel poverty, so the project was an opportunity to widen their networks. People spoke about having '*more networking with a wider range of agencies*' and again the opportunity to make more of an impact by co-working was seen as more important than the overall APS approach:

'... it's not so much the approach but contacts with different energy specialists - the Energy Trust, NPower, Hartlepower – we work together and pool ideas.'

Working in this way, coming together with community members, is an aspect of the APS approach and was seen by energy providers as a key opportunity. Companies were not always trusted by community members who saw switching simply as a way for them to take business from other energy companies. Working with the HAL enabled them to connect with communities and build trust:

'... [our] experience is that it is difficult to engage with some people and recognise the need to try different ways. It's good for people to recognise and understand that we're not selling or trying to convert customers. We need to work through this and it's helpful doing this through trusted third sector intermediaries.'

'...the AL approach could be used in areas where there are concentrations or pockets of vulnerable people to get people on board, win hearts and minds – rather than emails and newsletters. We need a physical presence and to invest time in gaining trust – being behind a desk in an office doesn't create the same level of buy in.'

The 'bottom up' approach of the HAL, and engagement of local communities and third sector organisations was seen as key for larger corporate organisations. They valued the momentum and enthusiasm generated by the workshop and the potential for the work to engage with more 'vulnerable' customers. This was reflected in the group meeting, where decision-making was shared and there was a sense of collaborative working, despite the different agendas of the organisations.

9.3.2 Energy Project Challenges

One of the difficulties faced by the project group is that not all the members are based in Hartlepool. Having buy-in from senior staff from energy companies highlights the success of the relationship building process, but as a result people sometimes had to attend meetings virtually or by telephone:

'I've only been to one meeting as based in Leeds and I tend to dial in. Quite a few other people do this too.'

'...it can be trouble for some people to travel to Hartlepool so people from further localities dial in, which shows commitment.'

The distance of some of the group members from the work on the ground was apparent in our conversations. They were positive about the work but often didn't feel able to give feedback about impact and felt it was too early to assess its effectiveness. The face-to-face work was carried out by local staff and volunteers, and senior staff in the energy companies were not aware of the detail. The reality of switching was often complex, as one volunteer describes the process:

'The whole Switch thing is a challenge, people come for food or something else and they haven't brought their bills or don't know about their tariff and we just don't have

what we need to do a proper quote and then you have to ring them back or chase them up and you lose momentum. If you don't close the deal there and then it's really hard to do it afterwards.'

The group were aware that there was a need to build trust with communities, and this was apparent in the face to face work:

'People don't really know you, there's no relationship and there is sometimes an assumption that you are getting something out of it. One person said to me 'are you getting a back-hander from npower?' The only way to get over that kind of suspicion is to build up a reputation over time.'

The work of volunteers in the energy group highlighted one of the key issues across the HAL2 projects, which is the need to follow up on contacts. In the energy project, it was a time-consuming process of confirming details and 'closing the deal', but following up on potential savings and confirming that the potential saving became an actual saving is a challenge for all the groups.

'The events have been a success I think. Personally, I've found it frustrating because it's so hard to get people to follow through on switching, that means the figures are only estimates and it's all a bit woolly.'

This echoed a concern of staff who worked for energy companies, something which was also evident in the other projects. The work was building on existing work around switching and energy conservation, so it was difficult to identify what additional value the HAL work was bringing:

'Will the evaluation really quantify the success of the AL, what difference has it made? There are already energy champions working on fuel poverty and reducing energy costs, how will we know if something is an AL outcome if that was there already?'

The JRF team only account for the additional work of HAL2 when recording potential financial benefits, the way in which outcomes are recorded could be communicated more clearly to HAL participants.

One project group member talked about using data in a much more comprehensive way to try and tease out the work of the HAL:

'...we could use specific information/data to inform which households or properties the energy group should target and discount those not covered by other initiatives or schemes.'

It might also be possible to identify any increase in switching by comparing the workload of energy staff pre and post the initiation of HAL2. As with the Benefits project, there could be a need to be more targeted over time, as 'easy wins' are exhausted, and the team need to

identify particular households and diversify from events-based working. Again, capacity was an issue, chasing contacts, confirming details and case working was time consuming, and to target specific households would require more research and more activity on the ground. Several of the participants talked about the need to use more local people in the process, and the Advocate role, which is being developed by the JRF team, has much potential to address some of these issues.

In recognition of some of these issues JRF have launched a Solution Support Fund, which offers funding for ideas which further the work of the groups. It might be possible to use this fund to support the development of the Advocates as a formal project.

9.4 The Advocates Project

The idea of a 'navigator', someone who could help local people access help, was raised in the HAL2 workshop. The Advocate role emerged from this idea and we describe it here as a 'project' because its development has great potential to tie together the work across HAL1 and HAL2, whilst engaging community members and benefitting from their knowledge and skills. The role was conceived by the JRF team as one of community engagement; volunteers would be recruited and trained, and would attend events to engage with local people, acting as a point of contact and referring to the relevant projects. The Advocates are given computer tablets to enable them to demonstrate online resources and record their activities and contacts as they work.

The Community Development Worker recruited eleven volunteers and three paid staff who were invited to an initial meeting and then to a training session which looked at how to engage community members, how to manage personal safety, data protection requirements, as well as how to access web resources and specific information about each of the projects. Six of the twelve had previously taken part in the community research training and had attended the HAL2 workshop. Of the other six participants, three were from local third sector organisations and three were new recruits to the work.

Setting up the project after the HAL 2 launch was very time-consuming, as it involved not only recruiting and training the volunteers, but also negotiating and clarifying the use of personal data, securing support from organisations to deliver training and content, producing an Advocate handbook, purchasing the computer tablets, designing a Google Sheets database for each Advocate and coming to agreements about information sharing with different organisations. The work is at an early stage, but the Advocates have begun to attend the Food and Fuel Fairs, various community-based 'drop ins' and are being introduced to using the tablets to demonstrate switching and record data.

9.4.1 The Advocates Project - Activity and Progress

We spoke to eight of the Advocates, and their experience of the project was highly positive, although some had attended the training but not actually started the work.

'I feel that it's really worthwhile and rewarding, it's good to be out there meeting people and I feel like I'm getting used to that and feeling more confident and I'm enjoying the interaction with the other Advocates and the team.'

Overall, they felt the training was useful and equipped them to do the tasks required within the projects:

'I'm not great with computers, I can use them but I'm not great, but they made it easy. Everything was there on the tablet and the instructions were really clear, it was good.'

One Advocate had missed the training but felt there was enough support at the monthly 'catch-up' meetings run by the JRF worker. Advocates were also clear about what the role involved:

'The training covered how to access the website, like Fuel tariffs; energy efficiency schemes and who is eligible for what; how to talk to people in order to get the information that you need.'

'...going out with another person to contact people and put them in touch with services that can help them financially.'

'...going into the community to help and advise people on how to reduce household bills, help with budgeting, saving money through online shopping.'

Some of the more experienced Advocates were also clear about the limitations of the role and the need for boundaries in the work, especially when dealing with potentially vulnerable members of the community:

'The training was really necessary because it clarified the boundaries of the role, that we're not counsellors, it's not about healthcare and it also covered safeguarding.'

The work was at a very early stage at the time of the evaluation. Several of those we spoke to had not taken part in any of the events or acted as an Advocate. For those who had taken part, the experience had been rewarding, and many enjoyed the contact they had with members of the public. The Advocates also felt well supported, largely due to the input of the Community Development Worker, who made himself available to them and ran monthly sessions, in which the Advocates could practice their skills and exchange information.

'[the worker] is at the end of the phone and there are regular meet-ups with other Advocates where we can get to know each other – we ask each other if there's better ways of doing something, share ideas and get support.'

One Advocate also appreciated the opportunity to attend the 'Energiser' day. He felt the content, and the way the day was structured, was more helpful than the monthly meetings:

'That day really buoyed me up. It made me want to carry on with it. At the Advocates meetings, people can be quite negative sometimes and it made a difference having

the icebreakers and sitting at round tables and doing the team work. I'm not good at sitting at square tables and reporting on stuff.'

Some of the Advocates were local people who had experience of struggling with money or housing and were motivated in part by that experience. Taking part had helped them gain confidence to address issues directly:

'I've changed other things as well, last year ...I got a letter from the council saying that I owed council tax and I didn't even know I was in arrears. They were saying I owed this money but if I had known about it last year I might have been able to do something about it, make a claim or something. I might have let it go in the past but this time I said no, and I've challenged it and I'm in the middle of that now.'

The enthusiasm and engagement of the Advocates is a highly positive outcome of HAL2, the work has the potential to engage community members more widely across the town and to contribute towards the JRF/JRHT outcomes by building the skills and capacity of local people to take action in their communities.

9.4.2 The Advocates Project Challenges

There is a comprehensive 'Advocates Guide' and most of the Advocates were aware of what the role involved, but for those who had been more peripherally involved there was sometimes a lack of clarity about the overall aim of the project:

'Not really, I have a vague idea of what it's about, speaking up for people, challenging things, I haven't seen a role description.'

The work involves supporting people to 'switch' and signposting to projects, but there are also many other potential outcomes for the Advocates themselves. Also, involving local people in this way provides connection across the projects and potentially better engagement with community members in face-to-face sessions. The project is at a very early stage, but the JRF team could consider revisiting their thoughts about the work of the Advocates project, outlining the longer term aims and possible outcomes from the project and aligning these with the JRF/JRHT strategic outcomes. This would also enable the team to identify the kind of input that would be needed to support the Advocates and how that might be resourced.

This input was, however, another demand on the time of the worker, who was also coordinating the work of the projects and doing much of the day to day administration. The worker felt he had been able to do *'lots of hand - holding'*, but it was a challenge to match each Advocate with opportunities that would suit their skills and interests. The need for more support was highlighted by one participant who felt that the Advocates should have dedicated worker time and be provided with more formalised training and support.

'There's no volunteer coordinator, [the worker] is doing everything...they go to him if they've got issues I suppose and he's working really hard, but they need someone who is there specifically for them.'

Equally, most of the Advocates had either not started the work or done just a handful of sessions, and they had not had a chance to experience the challenges that the role might present:

'In relation to advocacy and acting as Advocates it's not just a specific role they have, like dealing with young people or mental health. They will be meeting all sorts of people and lots of different things will come up, they need listening skills, communication skills, assertiveness and work on boundaries, they need these to be confident in the role.'

Whilst the experience so far had generally been positive, the Advocates had different levels of experience and some had struggled at first with the challenge of engaging with members of the public who they had never met before:

'It's a steep learning curve and I've been feeling my way, I think the professionals are more the Advocates at the moment, but I'm learning a lot from them and getting more confident.'

One Advocate spoke about a Food and Fuel Fair she attended where people were reluctant to share information about financial matters, or to admit needing help, with someone they had just met informally:

'I found people were giving us a wide berth, I felt a bit uncomfortable, like we were putting them under pressure. You could see that people were struggling, there was one girl at a table and we were talking about how she was struggling to get food but the minute I asked if she needed help with that, she just waved me away. She said "people are dealing with that", you could see people just clamming up.'

Such reluctance is something which could be overcome as the profile of the work builds, but they are issues which need to be reviewed and addressed as the projects attempt to engage harder to reach communities. Equally, there was a tension at times between building the capacity and confidence of the Advocates and ensuring that the information and advice given was correct. The bulk of this work was carried out by the Community Development Worker, who was also tasked with the overall co-ordination and administration of HAL2.

The project has the potential to work with community members to develop their skills and resources, increasing confidence and employability of participants. In order to do this the project would have to be more formalised, with additional support for volunteers, a defined role and more in-depth training. The JRF team might want to consider if this is feasible or desirable, and how funding might be sought to support the work as a formal project. JRF has made available a Solution Support Fund for projects developed under the HAL umbrella, and this might be a possible source of funding.

9.5 Key Points

- The HAL2 approach was much closer to the model used by Community Solutions in the US when addressing the issue of homelessness. It brought together existing work under the banner of the 'Million Pound Challenge', enhancing and maximising outputs.
- Bringing together existing resources meant that staff could easily align HAL2 with their work. This has enabled a fast pace of development and the successful establishment of the three projects. In HAL2 the projects have generated a potential financial benefit of £155,990 at the time of writing. Of that total the Benefits project generated £121,336, the Food project £2,092, the Energy project £11,548 and the Advocates £21,014.
- The 'bottom up' approach of the HAL and engagement of local communities and third sector organisations was seen as key for larger corporate organisations. Overall, the networking between organisations and individuals was valued highly by all participants.
- The pace of the work and the pressure to deliver could mean that communication was sometimes poor, and the structures that supported action lagged behind the work. This lack of structure and clarity about who was in the team was confusing for some participants.
- Since the approach pulls together existing resources it can be difficult to untangle the impact of the work of HAL from that of work which was existent and ongoing. The JRF team have addressed this by only including financial benefits from additional work, such as the Food and Fuel Fairs. However, they could also explore ways to demonstrate the added input, for example, by identifying the level of switching pre-HAL2 or by examining take up on previous benefits campaigns. The work of the Food project would also benefit from clearer goal setting and evaluation.
- The work of the Benefits project required specific expertise, which meant that it was often difficult to find a role for community members within the group.
- Within the Benefits group there was a sense of 'business as usual' and there was a reluctance to explore new approaches.
- The reality of switching was often complex and time consuming as people rarely had all the information they needed and as a result had to be followed up by staff or volunteers. This meant that potential switches were often not carried through, as people lost momentum after they left.
- The Advocates project has been successfully established and has potential to both contribute to the outcomes of HAL2 and to build the skills and capacity of community members. The group would benefit from some reflection on the part of the JRF team, drawing out the long-term aim of the work and highlighting the added value of the project in the context of the JRF/JRHT strategic outcomes.
- The JRF team might consider if additional resource could be sought for the Advocates project. The volunteers and the work of the project would benefit from more structured and dedicated support.

10. Agile Problem Solving in HAL2

Awareness of the APS approach and 'buy-in' to the method seemed weaker in HAL2. People were less aware of the Action Lab, and even those who had taken part in the workshop had retained less of the information and remembered fewer concepts. In part, this was because HAL2 model was more reflective of the Community Solutions approach which was used in the US. In that model the core team is well versed in the methods and works to facilitate and drive the work, pulling in a wide range of organisations and individuals. It is inevitable that in this process, people take part in the work who have no awareness of the APS approach. It is a tension in the APS method that as the movement grows, the original concepts can be diluted. It is key that, in this process, the core team and key members of the projects retain a sense of the method.

However, the shorter workshop was also accompanied by a lessened stress on the approach. There was little focus on the 100-day sprint, and as one JRF team member stated:

'I think APS is still there but it's more in the way we do things, its implicit, but I don't really mention it...it's off-putting.'

Some people felt that HAL2 did not reflect the original APS approach that was demonstrated in HAL1. This may be in part because the workshop was shorter. Not having time to really build the team and get across the concepts meant that some participants saw the workshop as *'a long-winded planning exercise'*.

'The AL has ended up with something that hasn't really taken on things like APS, Human Centred Design and SWITCH – it has turned in to project driven work which misses the point.'

'People collectively reverted to type with no creative spark.'

However, there were also participants who, no matter how long the workshop was, simply didn't buy into the approach and did not intend to use it. These participants were in a minority, but they did hamper the diffusion of the approach throughout HAL2.

What those working on HAL2 did embrace however was the 'bias to action' element of the approach. The ambition of the goal meant that there was a drive to create activity very quickly, and the work developed at such a fast pace that it was hard at times for the team to keep up with unfolding events:

'I think it's the bias to action, that's really shaped the work, once it was branded and badged the getting on and doing has been uppermost. The bias towards moving it forwards has meant that we've had to retrofit things because we didn't have months to plan.'

In HAL1, the pressure was experienced by the project teams, which were led by local workers. In HAL2, the overall organisation and coordination has been shouldered by JRF

staff, who are experiencing the pressure to deliver on a very public goal, as one JRF team member said:

'I think sometimes the 'agileness' takes one under the pressure of the goals.'

The pressure to deliver on the goals pushed the team into action and made it hard at times to effectively gather data and review the progress of the work, an iterative process which is core to the APS approach. Several of the participants talked about the need for more thorough evaluation of what they were doing and time to reflect on the process. The team did ask for feedback in meetings, and changes were made to the venues and the way the events were delivered, but there was a need to more thoroughly examine the work and to listen to feedback.

Again, one of the difficulties in asking for feedback about the work was that many of the participants were not overly familiar with the APS method and only had knowledge about their own piece of work. As a result, people were sometimes hesitant to give feedback which they thought could be perceived as being critical of the JRF team, who they thought were working well. The idea of 'failing forwards' and process of honest review was not generalised across the group membership. This was demonstrated in the contrast between the evaluation interviews we carried out for HAL1 and HAL2. In HAL1 nearly all were familiar with the concept of 'failing forwards', they had time to build a team and develop trust amongst the team members and so were very frank about the failings of the work. That frankness enabled the team to critically review and learn from the work. In the HAL2 interviews, we found less critical reflection and a much more fragmentary knowledge of the programme as a whole. Taking time to pause and review could only improve the work in the future. It is worth noting that the Advocates had much to say about the process of engaging with people at events and about the way the events were delivered. This was fed back in the monthly meetings but there was a need for a more structured examination of the work and some time for reflection.

After HAL1 the JRF team felt that they had familiarity with the APS approach but did not feel totally confident in delivering an Action Lab without the support of the external consultants. In HAL2 we found that the experience of the training lab and the second workshop, followed by the development of a second tranche of projects had increased the knowledge and confidence of the team in delivering a workshop. When we examined the input of the US consultants in HAL2 there was a sense that there was now capacity within the JRF team and the local community to deliver a Lab independently.

Having said that, delivering an action lab is a difficult balancing act in which the team have to pay attention to both action and reflection and it is easy for elements to be lost or take a back seat. The CS consultants felt that the JRF team no longer needed ongoing support but:

'...I think they need five questions that they're forced to look at every two to three weeks... What are the opportunities to fail forward? To have a growth mindset? They're experiencing very common barriers and worried that it means they're not

succeeding and that's not at all what it means. I think they won't get there until we leave completely.'

The JRF team have taken the decision to pause before considering whether to deliver another HAL. This will give them the time they need to reflect on the process and to consolidate and evaluate the work they have done so far. The team are now working with the approach, adapting it to the UK, and Hartlepool, context and are more confident in using the elements which have proved most effective. As one team member commented:

'I would do it again, HAL brings people together for a longer time in the same space and the bias to action approach is something I'd take away, you need to build the infrastructure behind it but it's useful, definitely.'

10.1 Key Points

- The JRF team have been highly successful in bringing together diverse groups, organisations and individuals with the HAL. This work has been strengthened and broadened in HAL2 and was one of the strongest elements in the work.
- The strength of the 'movement building' has brought in new staff and volunteers who are not as familiar with the APS approach, which highlights the need for the JRF team to be the 'holders' of the concepts and methods.
- There is now enough knowledge about the APS approach in Hartlepool for the team to work independently of the US consultants.
- The JRF team have chosen to delay any decision about the delivery of further Action Labs and this would be a good point to consolidate the work of the current Action Labs. This could involve creating a more structured plan for the work, improving reporting and recording systems, reviewing the support needs of the groups and reviewing the effectiveness of the work so far.