

# Cwm Taf journey planning case study

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### Background

The Cwm Taf Public Services Board (PSB) is comprised of two local authority areas, Merthyr Tydfil and Rhondda Cynon Taff (RCT). We met with colleagues from the PSB in July 2018 to explore whether and how our social research function could support them. It turned out that evaluation and measuring change was high on the agenda for both of us.

### The challenges they faced

We held our follow up exploratory meeting with the Cwm Taf PSB support team in November 2018. By that point, they were pretty certain that improved evaluation knowledge would support the delivery of their well-being plan. They started their evaluation focus by looking at all the work that fell under the Thriving Communities well-being plan objective. This work was being piloted in two Community Zones: Rhondda Fach in Rhondda Cynon Taf, and the Gurnos in Merthyr Tydfil. The support team articulated a number of needs and questions:

- How do they effectively break down large, complex and “soft” outcomes like Empowered and Well and Happy Communities into achievable and monitorable measures?
- How do they demystify evaluation at all governance levels, including grassroots and strategic, so it can become less daunting and “scary”?
- How can they be expected to understand the impact of Community Zones before they were fully versed in the activities and delivery methods taking place within them?

The Cwm Taf support team, PSB and the strategic groups that sit under it, including the Strategic Planning Board (SPB) and the Thriving Communities Strategic Group had some understanding of journey planning, logic models and Theories of Change and associated technical terms. However, one of the two community zones were not ready to start their journey planning, while the other area had already drafted their logic model. As a result, there was a need to develop a journey plan that could be applied to both areas, while respecting and giving space to the needs, issues and interventions unique to each area.

The Cwm Taf support team were also aware of a subtle but very real concern given that many public sector organisations have become accustomed to using standard mechanisms to report progress. The support team were not sure that some journey planning principles would be fully appreciated or embraced by some members. For example, journey planning places just as much importance on change and improvements in well-being as it does performance measures and indicators. Also, instead of solely relying on statistics and quantitative data, it encourages the use of qualitative data which allows change and progress to be contextualised in relation to people’s and communities’ experience and stories.

### How we helped

We thought it was essential that there was clarity among as many of Cwm Taf’s stakeholders as possible on the core goals and purposes of the Community Zones. If not, it would be challenging to implement delivery plans that aligned coherently with the change goals they had committed to in

their Well-being plan. We therefore revisited the journey planning (Logic Model) that one of the Community Zones had begun. We worked with the Community Zone Strategic Group to explore and determine what success would look like for each outcome area in terms of long-term, mid-way and immediate change. We hoped group members would resultantly be able to concretely visualise a *potential* change story in the Gurnos and Rhondda Fach.

To illustrate the close relationship between journey planning and evaluation planning, we asked the group to think about the appropriate evidence bases that would convey change and improvements in each of their outcome areas. We explained the need to continue working through the journey plan until all elements of it had been loosely outlined, including key deliverables, activities, and resources, explaining that all elements of the journey plan could be used for different types of evaluation at different points in the programme journey. We emphasised the intended dynamic nature of journey plans, which should not be used to dictate a plan that needs to be rigidly stuck to but used as a programme reference point to check if programme processes and progress is panning out the way originally envisioned. We wanted them to understand that journey plans can be changed and worked with in exploratory and experimental ways to maximise a project's impact.

Once this dialogue had started, the Cwm Taf support team thought the key messages should be communicated more widely within the PSB, so that all four well-being objectives could receive the same level of robust planning and consideration. We therefore held a "What Success Means" workshop with the PSB Strategic Planning Group (SPB). There was a need to revisit and reframe the objective statements so that they could become clear impact statements which would encourage focused outcome goals and indicators. We hoped that the work undertaken would be the beginning of a continued journey planning conversation within the SPB.

We hoped that completing a whole journey planning process with Cwm Taf PSB would result in a template that would allow them to robustly journey plan and evaluate all their well-being work. We therefore ended our pilot evaluation support with them by completing a journey plan for two outcomes within the Thriving Communities objective which resulted in a visualised journey plan.

### **What did we achieve?**

Cwm Taf support staff have given us some of their time to explain whether and how our work has added value to their delivery plan and ways of working. They also shared their ongoing journey and future plans.

The support team felt that our workshops provided Cwm Taf PSB with a clearer understanding of journey planning and its benefits than they previously held. This has worked to expand their awareness of good evaluation, challenging them to think beyond traditional measurement parameters. Our evaluation planning support gave rise to discussions on effective evidence, and for one coordinator, highlighted the crucial role of qualitative data, which can point to the "so what" behind quantitative findings. They felt this understanding could promote meaningful public service data collection which advances on traditional performance measurement.

One of the local authority areas has been able to use their new knowledge to hold journey and evaluation planning workshops with community members. The staff felt their learning readied them to provide clear guidance on journey planning intricacies in engaging and community-centred ways. They have also been able to communicate the journey planning decisions made by the Community

Zone's Strategic Group to community members and there seems to be a greater understanding of how well-being objectives can be gradually met and measured. One local coordinator reported that local feeling toward achieving well-being objectives is less frenzied and pressured. They attribute this to the responsive and flexible working encouraged by journey planning which has allowed local people in the community zones to see programme delivery as an opportunity to learn about improving well-being rather than a challenge in solely meeting target driven outcomes. The coordinator feels that this learning process has therefore, to an extent, encouraged more community involvement and ownership of the Cwm Taf Well-being plan.

### **Cwm Taf's onward journey**

Cwm Taf PSB are now embarking on year two of their well-being delivery journey. The support team feel that while there is commitment to developing and implementing a robust evaluation framework, particularly for the Thriving Communities objective, time is needed to convince all partners of the benefits of an overarching journey and evaluation plan which addresses all well-being objectives. Cwm Taf PSB recognises it cannot afford to lose sight of the need to assess how and whether it is making the intended long-term improvement to local well-being.

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