Lankelly Chase

LANKELLY CHASE FOUNDATION:

PLACE INQUIRY

Dancing with Systems - Learning Partner response to the question: "Is our approach helpful?"
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"Systems are inherently unpredictable. They are not controllable... The idea of making a complex system do just what you want it to do can be achieved only temporarily, at best…

Systems thinking leads to another conclusion, however – waiting, shining, obvious as soon as we stop being blinded by the illusion of control. It says there is plenty to do, of a different sort of 'doing'. The future can't be predicted, but it can be envisioned and brought lovingly into being.

Systems can't be controlled, but they can be designed and redesigned. We can't surge forward with certainty into a world of no surprises, but we can expect surprises and learn from them and even profit from them. We can't impose our will upon a system. We can listen to what the system tells us, and discover how its properties and our values can work together to bring forth something much better than could ever be produced by our will alone.

We can't control systems or figure them out. But we can dance with them!"

Donella Meadows, Dancing with Systems (2001)

1. What is Lankelly Chase Foundation's approach?

Lankelly Chase builds partnerships across the UK to change the systems that perpetuate severe and multiple disadvantage. They develop and support action inquiries into the changes that are needed. They don't think any one person or organisation has all the answers, and so they aim to make these inquiries as collective and collaborative as possible. This report is focused on the inquiry question: How do they support places to build the system behaviours?

1.1 What is the scope of the inquiry?

Lankelly Chase Foundation (LCF) undertook a number of different strands of activity in order to frame this inquiry and set it in motion.

At the highest level, LCF has taken three approaches to place based work:

1. Supporting other foundations and national agencies e.g. Corra Foundation

2. Supporting individual organisations who are taking a collaborative approach to place

3. Working more directly in places, through 'associates'

This report focusses on Approach 3, and incorporates aspects of Approach 2, where those approaches have been combined in a place. The following section describes the five elements of LCF's approach. We (the Learning Partner) then present our reflections as Learning Partners on the three main elements which the Inquiry explored: structures and roles, learning and sense-making, and money and funding.

1.2 The five main elements of LCF's approach to place-based systems change

In this section we will describe how the inquire was originally framed and designed. We describe the range of actions which were undertaken by LCF to establish the inquiry.

1.2.1 Publishing desired System Behaviours

Supported by Newcastle University, LCF brought together a range of its grantee partners, together with system-change thinkers and practitioners to identify the behaviours we would expect to see within a system that was working effectively to recognise the strengths, and meet the needs of people who experience severe and multiple disadvantage.

These behaviours are about perspective, power and participation. A description of each of the behaviours, and the assumptions which underpin them, can be found here: https://lankellychase.org.uk/our-approach/system-behaviours/

Perspective
- People view themselves as part of an interconnected whole
- People are viewed as resourceful and bringing strengths
- People share a vision

Power
- Power is shared, and equality of voice actively promoted
- Decision-making is devolved
- Accountability is mutual

Participation
- Open, trusting relationships enable effective dialogue

- Leadership is collaborative and promoted at every level
- Feedback and collective learning drive adaptation

1.2.2 Choosing places with which to work

LCF decided to explore how it is possible to bring about these desired System Behaviours by working with a number of places. These places were chosen on the basis of some form of pre-existing relationship with LCF – often places where LCF had funded a particular organisation or intervention which had sought to create system change (Approach 2, above), or where LCF staff had had dialogue with people from that place which indicated that there was an appetite for system change work to be done.

These places are:

- Barking and Dagenham
- Barrow in Furness
- Gateshead
- Manchester
- York

1.2.3 Creating a set of roles and relationships which help to bring about those behaviours in each place

As each place offered a different context and different challenges, from the outset, LCF staff knew that the work undertaken in each place would be different. The commonalty across the inquiry came from the set of roles, and the relationships between those roles, which LCF envisaged and created. In creating these roles, LCF were not asserting that these was the correct or required infrastructure for place-based system change. However, as they acknowledged the complex nature of this challenge, they took the appropriate position that they needed to experiment with ways of intervening to support system change. These roles were therefore viewed from the outset as provisional and experimental.

Broadly, LCF envisaged four Roles that would be played within the inquiry:

Actors in place

These were the actors that made up the local system that served (for better or worse) people who experience severe and multiple disadvantage. The primary actors who played this role, across different places were:

- People with lived experience of disadvantage
- Local Authority members and officers
- Other public servants operating in those places
- VCSE organisations operating in those places – particularly those that were currently (or previously) funded by LCF

Associate

LCF created the role of 'Associate' to be an external facilitator of system change within each place. These people and organisations were resourced by LCF so that they could offer their time and expertise to the actors in each place, enabling those actors to reflect on how their place was operating as a system which served (and was partly constituted by) people who experience disadvantage, and what needed to happen in order to make that system work better.

From the outset, LCF staff envisaged that they would have a role in the inquiry in each place. This role was to choose which places the inquiry would operate within, and maintain an on-going dialogue with those places about how the work was progressing, and the future needs of that place-as-system. The nature of this role for LCF staff was partly due to the relational nature of the funding that LCF offers – it maintains close on-going relationships with the organisations and interventions it supports – and partly because the actors in place desired to have on-going dialogue with LCF staff about the needs and progress that the place was making.

LCF staff would also play a role in helping the actors in each place, and the Associates to recognise and meet their development needs, through the provision of capacity-building and training.

Learning Partner

The role of the Learning Partner was envisaged as a mechanism to help the people and organisations playing the various roles to be able to reflect on their work and build understanding about the process of place-based system change. It was envisaged that the Learning Partner would (a) act as a mirror to:

- the activity that was happening in each place,
- the Associates
- LCF staff

And (b) support those playing the other roles in the Inquiry to make sense of the information they saw through that 'mirroring' work

Finally, the role of the Learning Partner was also to support the other roles to produce a Learning Framework, which would deepen the understanding of the process in the inquiry - how learning was driving place-based system change.

1.2.3.1   *The structure of the inquiry - relationships between the roles*

The structure of the inquiry, as originally envisaged, and as manifest in the roles and the relationships between the roles, was therefore like this (note it did not operate in exactly this way in each place):
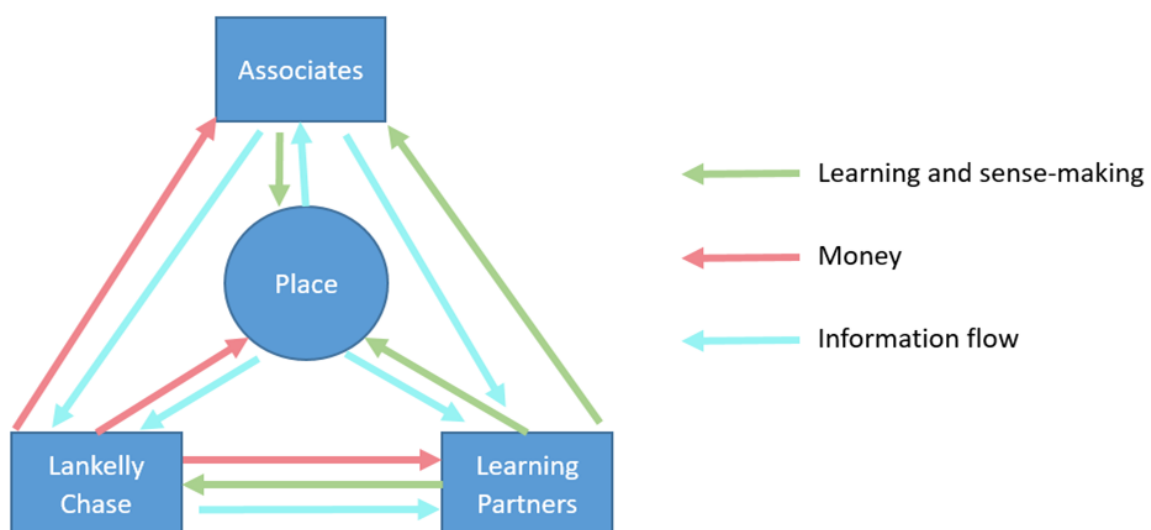
1.2.4   The development of a learning approach

That LCF's work in this field is framed as an "inquiry" rather than a "programme" is significant. All partners and Roles within the inquiry have been encouraged to adopt a learning approach. To this end, one of the key developments at the level of the inquiry as a whole was the process of developing a Learning Framework, which began to conceptualise how we view the role of learning as a facilitator of system change might. Furthermore, it helps to identify how the different Roles within the inquiry contribute to this learning.

1.2.4.1   Learning Framework

This Learning Framework builds on a framework for action research developed by Torbert (1998) and Reason and Torbert (2001).
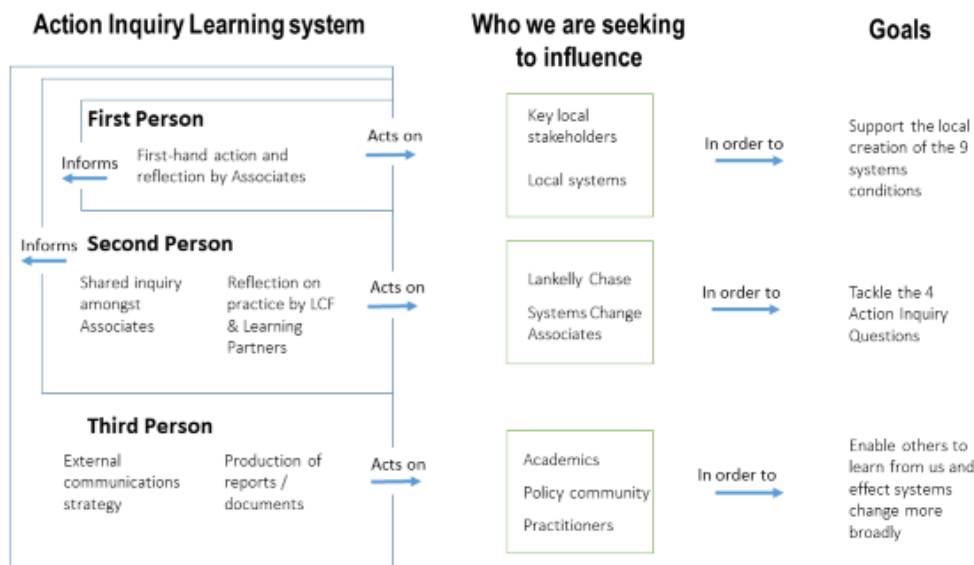
It is based on a set of ideas which describe:

- First person action research/practice - which involves direct reflection on an individual's world and their actions within it
- Second person action research/practice - which involves mutual inquiry among a social group into shared issues
- Third person action research/practice - which involves creating a wider community practice whose members are not known to one another and who do not communicate directly

Translated into the context of the inquiry, this becomes:

First person learning – the facilitation of system change activity by Associates, and their personal reflection on their practice

Second person learning – the shared group based reflection practices of all the roles within the inquiry

Third person learning – the communication of learning to people external to the inquiry

Action Inquiry Learning system

First Person
Informs ← First-hand action and reflection by Associates — Acts on →

Informs ← **Second Person**
Shared inquiry amongst Associates | Reflection on practice by LCF & Learning Partners — Acts on →

Third Person
External communications strategy | Production of reports / documents — Acts on →

Who we are seeking to influence

Key local stakeholders
Local systems — In order to →

Lankelly Chase
Systems Change Associates — In order to →

Academics
Policy community
Practitioners — In order to →

Goals

Support the local creation of the 9 systems conditions

Tackle the 4 Action Inquiry Questions

Enable others to learn from us and effect systems change more broadly

1.2.4.2   Learning activities

The Learning Framework was enacted through the following activities

First person:
- **Reflective writing –** Associates, LCF staff and the Learning Partner were encouraged to write short pieces in which they outlined and reflected on their practice to facilitate system change in places.
- **Case Studies –** Associates, working together with the Learning Partner, produced case studies of their system change activities in each place, together with an analysis of how these activities had created change
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Second person
- **Learning Communities.** The Learning Partner organised quarterly day-long Learning Communities as safe spaces for regular constructive feedback and shared inquiry into our common practice. Learning Communities brought together LCF staff, Associates and Learning Partners to engage in mutual inquiry and sensemaking. These were intended to build camaraderie, help people understand their roles better and perform better in them, and promote shared understanding.
- **Research interviews and analysis.** The Learning Partner undertook research interviews as a mechanism to enable reflection and adaptation. This role was originally planned to be undertaken at the place-level, promoting the generation and use of learning locally, and also at the programme-level through the synthesis and mirroring of learning. Action Research would generate in-depth case reporting and feedback for LCF.

- **Living Labs.** Living labs are an experiential, collaborative and participative method of sensemaking and shared inquiry, guided by an external evaluator. Professor Mike Martin from Newcastle University Living Lab was brought on board to facilitate Living Lab sessions at both the inquiry-wide level, and at the local level with place-based actors.

Third person
- **External communications.** The Inquiry aims to document and share learning externally to inform interested parties. It needed to generate communication channels which all actors in the process could contribute to. Different roles within the inquiry have produced blogs as a mechanism to share practice.

1.2.5   The role of money

The last element of this approach is the role which money played – how it was disbursed, in what form, and under what conditions – in achieving place-based systems change. Within the Inquiry, LCF have used money for four purposes:

- To provide financial support to organisations undertaking work in place (Barking & Dagenham, Barrow, Manchester, York)
- To pay for the time of an 'Associate' role to work at a local level (all places)
- To pay for time of a Learning Partner (across the inquiry)
- To pay for capacity-building support for people playing Roles within the inquiry

1.3   How have the different elements of this approach worked in practice?

In this section, we will reflect on how the last three of these elements of the inquiry: the structure of the inquiry (the roles, and the relationships between them), the learning approach, and the role of money have worked in practice.

1.3.1   The inquiry roles and the relationships between them

The people and organisations playing these roles have been as follows:

Actors/people in local places
Associates
Lankelly Chase
Learning Partner

1.3.1.1   The Associate role

The creation of the 'Associate' role was the most significant new development made by the Inquiry. This role seemed to carry the primary responsibility for facilitating change in the systems that serve people who experience severe and multiple disadvantage in each of the places.

We will offer a detailed analysis of what this role did in answering Question 2. At this point, we will offer some headline reflections.

The role was interpreted very differently, in the different places, and by the different people and organisations who played it

As a new and experimental role, it did not come with a pre-defined job specification or set of actions/tasks. The Associates undertaking this role were themselves experimenting – what was required of them to facilitate system change in the different places? Some Associates had an organisational method/approach to draw on, others simply had their own experience of seeking to

create change. This meant that one of the key tasks for the Learning Partner was to help the Associates to discuss and reflect on what playing this role well entailed. We offer reflections on this in answer to Question 2.

One way of understanding the diversity of practice is that it is a legitimate response to the variety of context in which the Associates worked. Therefore, we do not view this diversity as a problem. Instead, it is a necessary part of the experiment, and the task is to learn from each of the experiences, and to identify the commonality/difference between them.

The role was necessary – valuable work was done
One significant reflection we can make, is that the role seemed to be necessary. Associates were able to help actors in the system to see the system more effectively, to build trust, and to create or repair relationships between actors where they had been absent or dysfunctional. There is value in having external facilitation of system change activity in a place.

Collaboration between Associates
Due to the diverse and dynamic nature of the context, it was always envisaged that the skills of more than one Associate might be needed in any one place. It took time, but there is evidence of increasing collaboration between Associates. This occurred where the Associate leading the facilitation of change in one place, invited another Associate to deliver workshops or share practice.

Uncertainty
Due to its experimental nature, playing the Associate role came with significant uncertainty for those who did it. They frequently felt uncertain about their practice, their position in relation to Actors in Place, and what they were achieving. This uncertainty created feelings of anxiety, a sense of isolation, and on occasion a sense of 'guilt' about the pace of change they were able to facilitate.

Associates developed strong attachments to place
In their desire to facilitate change, Associates often developed strong attachments to the places in which they worked. Sometimes, the extent of these attachments meant that the Associate's role as neutral facilitator of change blurred into becoming an agitator for change within parts of the system. The extent to which it is possible to both facilitate and drive change in the system requires further exploration.

1.3.1.2   Overlap/tension between the roles
The experimental and provisional nature of the roles and relationships in the inquiry, the nature of the roles, and the relationships between them (and therefore the structure of the inquiry) mean that we have learnt a significant amount about how these roles work, and how they relate to one another in practice. In this section, we will focus on the relationships between the roles. We discuss the types of activities undertaken by each of the people/organisations playing the roles described in the first section.

The roles, as originally envisaged, had a certain amount of overlap built into them, which led to some lack of clarity for the people/organisations playing those roles. This manifest across the boundaries between the roles in the following ways. It is important to note that the following are *examples* of tensions/lack of clarity between the roles; not all of these challenges were manifest in all of the places.

LCF Staff/Associates
There was some confusion for some of the Associates about who had the lead relationship for the inquiry with the Actors in Place. Understandably, many of the Associates viewed themselves as

'agents of system-change' in the places in which they were working. As a consequence, they took responsibility for creating a plan for a series of interventions/activities which would help to enable this change. They viewed their dialogue with the Actors in Place through this lens.

However, in practice, the Actors in Place may also have been speaking independently with LCF staff about the series of system-change activities which were happening in that place, sometimes beyond the activities supported and facilitated by the Associate, and which were often funded by LCF (outside of the funding given to Associates). Both these sets of conversations were perfectly valid within themselves, but could lead to a sense of confusion about who was leading the system-change facilitation work in the place, and who was responsible for co-ordinating this change activity into a coherent set of activities.

The uncertainty of the boundaries and remit of the Associate role has caused stress and a sense of isolation for some of the Associates, particularly as many are freelancers, without organisational support. This requires attention for the next phase of work.

By becoming ever more ingrained in the work of the place, Associates were responding more and more to the demands of local actors. Again, this was at once both an appropriate response from Associates seeking to build relationships (and therefore facilitate change) at a local level and yet, from another perspective raised questions about the Associate's capacity to challenge all the actors in place from a perspective of external neutrality.

Associates/Actors in Place

As facilitators of system change the Associates could understandably develop a sense of responsibility for how the place-as-system was working – they could begin to develop a sense of responsibility for the health of the system in that place. (This can be seen in the typology of action undertaken by Associates, outlined in the response to Question 2 of this report). However, the Associate role was not designed to be adequately resourced to be a role which took responsibility for the health of the system in the places they worked. This responsibility could only be feasibly taken by the Actors in Place themselves. The boundaries between the Associate's role as instigator and facilitator of system change, and the Actors in Place's responsibility for developing and maintaining the health of their system(s), were therefore, on occasion, blurred.

Associates/Learning Partner

It quickly became apparent that the roles of Associate and Learning Partner had elements of overlap. When we look at the activities that Associates undertook in order to 'Make Sense of the system' (see Question 2) we see the following:

- Mapping relationships
- Analysing power dynamics, finding who is excluded
- Understanding system processes and cultures
- Learning which actions work in their local context
- Investigating the dynamics and quality of relationships between key actors

These are learning activities which generate information which helps Actors in Place to see and understand their systems more effectively. They are therefore exactly the type of activities which we would expect Associates to use as tools to use learning as an engine of place-based system change. However, these are also the activities which the Learning Partner was planning to use in order to help understand each place, and track the change in the story of each place over time. There was therefore significant potential for overlap of roles.

The Associates and the Learning Partner negotiated this potential overlap in various ways – mainly by seeking to use the formal and informal information gathering mechanisms of the Associate to generate the information for the Learning Partner for each place. This was undertaken in order to give primacy to the system-change facilitation activities being undertaken by the Associates, and to avoid the duplication of time and effort for Actors in Place having to be interviewed by two sets of people about the same thing.

However, an unintended consequence of this negotiation was a lack of engagement with Actors in Place for the Learning Partner. Furthermore, because the information gathered by the Associates was (understandably) specific to their particular system change facilitation activities, it was not easily comparable across place. Significantly, none of the Associates gathered information directly about the state of play with System Behaviours in each place, which has led to the inquiry as a whole having a lack of information about how these are progressing.

Once more, this is an example of role within the inquiry legitimately seeking to achieve its own perceived purpose, but which played out as a lack of fit in terms of the relationships between the roles. From the perspective of Associates, it was natural to prioritise the information gathering activities that they needed, and it was also natural to be concerned that their fragile and evolving relationships with Actors in Place might be disturbed by Learning Partners demanding time of Actors in Place. We, as Learning Partners, have learnt that we were too passive in these discussions and negotiations, and that we should have offered either greater direction to Associates for their information gathering activities, or we should have been more assertive about the need for us to gather certain types of information directly from Actors in Place.

In addition, perhaps due to the title of "Learning Partner", the Associates have not explicitly described their change-agent role in terms of enabling learning (that must be the 'Learning Partners' job). This is an area for development going forward.

1.3.1.3   The structure of the roles in practice

In practice, therefore, the relationship between the roles in the inquiry, was more like this:
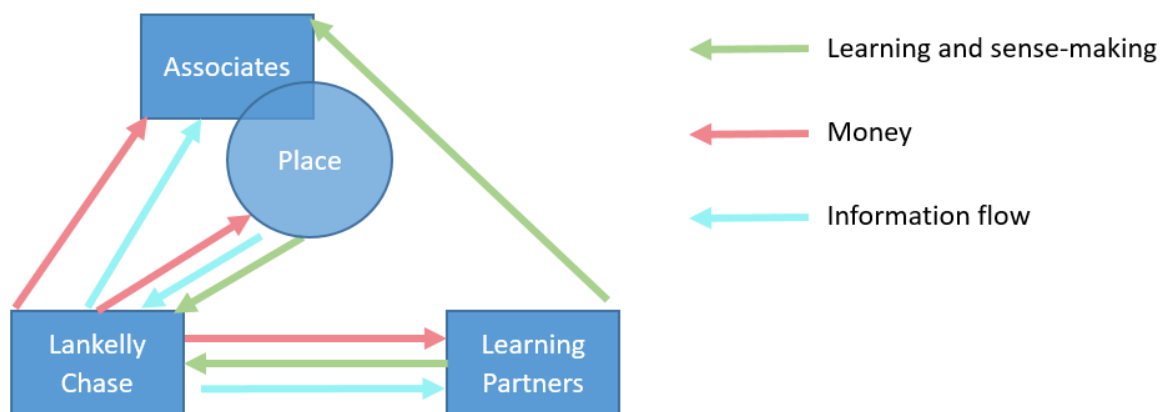
The key learning points were (a) that there was a disconnection between the Learning Partner and the actors in place, and (b) that the Associate's role became very closely embedded in the systems of places.

### 1.3.1.4 Absence of "Steward of Place" role amongst Actors in Place

One of the key reflections on the approach so far has been that one crucial aspect of the role of "Actors in Place" has not yet been sufficiently explored and articulated.

The aspect of their role that has been missing is the role of "Steward of Place". We conceive of this role as a form of "eco-system engineer" . It is a role which takes explicit responsibility for the health of the system in that place. In other words, we reflect that, up to this point, it has not been the explicit job of any of the Actors in Place to ensure that the desired System Behaviours are in place. For example, it has not been anyone's explicit role to understand the extent to which the System Behaviours exist in the place, nor to co-ordinate activities which would develop those Behaviours if they are absent (or under-developed).

Who plays this role – which combination of Actors in Place - is uncertain and requires further exploration. However, our learning so far indicates that it is very important for Actors in Place to understand the need for such a role, and to decide who amongst themselves will be responsible for undertaking it.

Furthermore, we think it is crucial that this role is undertaken by Actors in Place – i.e. amongst people who are part of the place. This is not a role which can be played by an external facilitator. However, this role will likely require significant support (at least initially) from external facilitators.

The relationship between the roles might in future look like this:
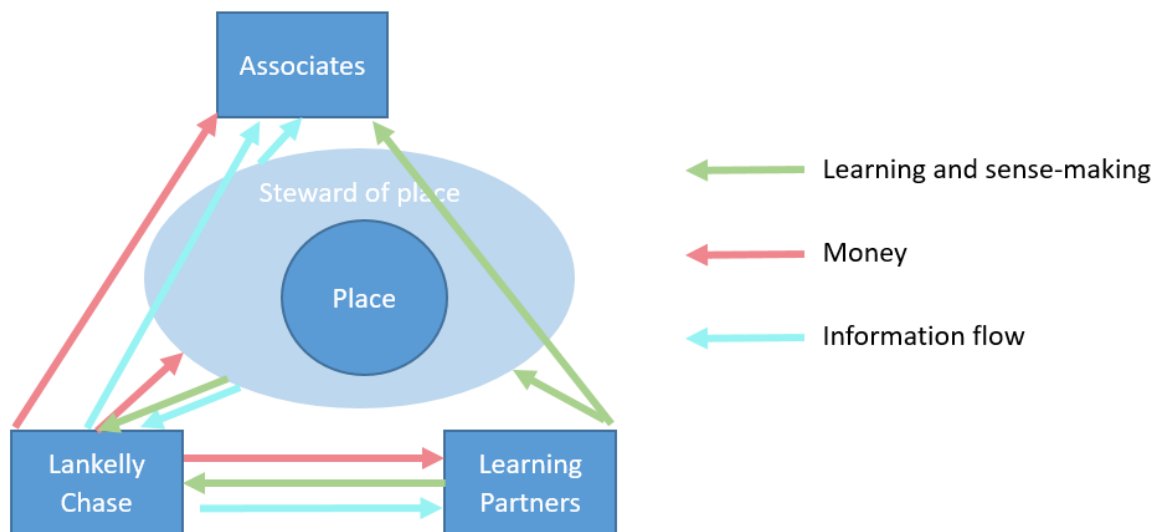
1.3.2 Reflections on Learning approach:

In this section, we offer a reflection on how the approach to learning worked in practice

1.3.2.1 It will take time to mature

It has taken a while for the Learning Framework to be developed, and has not yet been fully discussed by all the people and organisations within the inquiry. Key aspects of the programme – for instance the Learning Framework, or the system behaviours, have not been fully embedded in the methods or practices of all the Roles within the inquiry.

1.3.2.2   More reflection time is needed

In addition, People playing the different Roles within the system have provided feedback to say that they do not get to meet frequently enough in order to fully embed the processes of reflective practice, which the inquiry promotes, into their work. Quarterly Learning Communities did not provide the continuity or speed of response to local issues which Associates needed.

The Learning approach therefore seems to require to the creation of more frequent reflective spaces in which to create 'bridging' social capital across the boundaries between LCF staff, Learning Partner and Associates. As a consequence, the approach to learning in the inquiry as a whole has felt to various actors to be a little haphazard.

1.3.2.3   Being comfortable with uncertainty

The Learning approach is based on a powerful core principle for working in complexity – that we cannot know in advance what the right approach to create system change in places will be. The whole Inquiry is therefore based on a "probe-sense-respond" strategy, which is known to be the appropriate approach when responding to complex challenges. It is also underpinned by a profound belief that no-one in the system can see the whole truth.

Together, these principles and beliefs create a working environment in which uncertainty is normalised; we cannot be certain about what the right approach is, and we cannot be certain that our perspective is shared by others.

In order to respond to this, the Inquiry deliberately created environments in which the Associates, Learning Partners and LCF staff were able to share and reflect on their uncertainties together. This approach was broadly successful, with all Roles reporting that they felt comfortable talking about the uncertainties they felt about their practice within the Learning Community environment. From these conversations, we were able to create significant learning about the Associate role in particular (see Question 2).

However, there were also structural uncertainties – about the Roles, and the expectations associated with the Role, about which there was still a feeling of anxiety. As part of the evolution of the Learning approach, we have need to explore how such conversations can be facilitated. One mechanism which has proved beneficial on this front was the Learning Partner undertaking analysis of the roles, and presenting this back to the different Roles for discussion. It was felt that this could happen more frequently, and more rapidly.

LCF staff also created further support opportunities for Associates as the inquiry developed. Associates now have the opportunity for group supervision and time with a coach. This adaptation should help Associates to work through their anxieties.

1.3.3   Reflections on the role of money

The role of money in systems change is important and needs consideration. Part of the experience of system change programmes is that large-scale system-change temporary resources given by charitable foundations allow the creation of additional support services within a system. Such services may be desperately needed.

LCF have experienced this within the Inquiry. In two places they have funded activity which delivers services to people who experience severe and multiple disadvantage. They funded this activity with the view that by demonstrating that need could be met by alternative types of local delivery, it would create drivers for change in the system. Essentially, this views the role of money as creating alternative or additional services, which the system must then 'mainstream'.

However, the experience of this Inquiry has been similar to other system-change programmes which have tried to crate system change through the provision of additional/alternative services. When given to a place, such services can act as a pressure valve, allowing cash-strapped public agencies to relinquish the need to engage in systems change activity, and enable existing services to continue with business as usual.

One of the interesting possibilities which the LCF place-based inquiry is creating is to view the role of money in place-based system change differently. Under this perspective, money is understood as a way to give local actors capacity for reflection and undertake genuine change of existing systems. This connects the role of money to the key approach of the inquiry: that learning is the driver for system change.

1.4   Learning Points

We offer the following reflections as learning points concerning the question "Is LCF's approach helpful?"

1.4.1   The structure of the inquiry:

- It is helpful to have external facilitation to enable places to work more effectively as systems – it enables actors in those systems to see themselves as a system, and helps to build relationships that may have previously been dysfunctional or absent
- The external facilitation should not take on the role of looking after the health of the system. This is a role that people within the system should make their own. These actors should be 'Stewards of Place'
- The ambiguity surrounding the boundaries between the roles needs to be addressed. Most urgent, are conversations concerning which role within the Inquiry leads on the relationship with Actors in Place.
- The Learning Partner needs to directly engage with actors in place
- Uncertainty is a recurring theme – how can the anxieties around this be managed? How can living with uncertainty be made ok?

1.4.2   The approach to learning

- Learning is everyone's business – it is the driver for change at all levels
- The System Behaviours themselves have been an underused tool for shaping how systems in place develop
- The Inquiry would benefit from more reflection time, and the people playing the Roles would like more rapid feedback
- When working in complex environments, ambiguity and uncertainty will arise. The learning mechanisms for the inquiry must be able to bring these to the surface and enable conversation about them.

1.4.3   The role of money

- Money is very useful in buying time and capacity for reflection and for actors in place to create the information and relationships required to learn.
- Money can be useful in creating new examples of ways to respond to people's strengths and needs, but there is a danger that these examples release the pressure on existing services to change

The next report will explore the question "What are the skills/methodologies/processes required to support areas to develop the right systems behaviours?"