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Co-production
Network
for Wales

Mes yn Derw: co-production and involvement in Public Services Boards

Co-production Network for Wales Year One Report

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1. Introduction

This programme aims to move the practice of engagement towards co-production and involvement in Welsh public services. We set out to work with three Public Services Boards (PSBs) or clusters of PSBs, to contribute to closing the gap between the aspirations of our devolved legislation and the reality of implementation on the ground. Due to their membership and the reach of their work, effective change in PSBs will have an impact on a range of public service organisations and communities.

We are pleased to share our progress and lessons learnt at the end of our first year (of this five year programme). We have encountered some challenges, both internal and external, but have adapted to the changing circumstances to keep building relationships and mutual understanding, and supporting PSBs to improve their engagement in the direction of greater participation and inclusion. While we are far from achieving our co-production and involvement aims yet, we are pleased to report that this year has set a solid foundation that we shall continue to build on to develop effective working across our 3 clusters of PSBs.

In this report, we first present what we have achieved in the first year, in terms of setting up our team, working directly with the PSBs, and the range of other activities that support this work. We then share learnings and reflections for each cluster as well as overall trends that are emerging across our work; before thinking ahead to potential risks and challenges which we will remain alert to. Finally, we present an analysis of our budget and costs, and proposed adjustments for year 2 onwards.



2. What we've done in year one

A. Building the team

The programme support team

In the first 6 months we had the Programme Manager (Rachel Wolfendale) in post, with support from the Co-production Network for Wales Director (Noreen Blanluet).

Recruitment of the Programme Coordinator took place from June 2021 and Daniel Barnett was appointed in September 2021 as Programme Coordinator. He works 30 hours per week spread over 4 working days, and his role is to support the Programme Manager in working on the Mes yn Derw programme, as well as linking into the Co-production Network for Wales'

wider activities to enable the programme to be an integral part of the Network's portfolio. His role includes:

- supporting the rest of the team (programme manager and consultants) in regular activities as well as ad hoc (e.g. horizon scanning, development of evaluation framework);
- developing the PSBs Learning and Sharing Network (for all Wales PSBs), including a programme of online events and regular written updates;
- maintaining and updating our contacts database to ensure project-related messages are getting to the right people;
- testing ideas and techniques to improve the uptake of communications across the PSBs Learning and Sharing Network;
- looking after the logistics and monitoring for online events and activities, and for team meetings (online and in person);
- planning and supporting sharing events about the programme with the broader Co-production Network for Wales audience;
- ensuring communications are clear and inclusive, by monitoring the social media channels, linking up with Welsh-language translators, creating visuals and ensuring our message is relevant and understood bi-lingually;
- working across a variety of platforms, including websites and social media; and in a variety of media, including written, audio visual and other creative outputs;
- contributing to the wider Co-production Network's event and communications planning and delivery to ensure that this programme is visible.

Programme Manager Rachel Wolfendale went on maternity leave at the end of November 2021. Ena Lloyd was recruited to cover this period, a fluent Welsh speaker bringing her experience of working on multi-year programmes at Audit Wales and the Office of National Statistics. A handover period of one month ran through November 2021 (and likewise a one month transition is planned for Rachel Wolfendale's return in September 2022). This enabled Ena to build a good understanding of the programme and of the team before assuming the role in full. The Programme Manager role is covered in 16 hours per week spread over 4 working days, and focuses on:

- managing and supporting the teams of consultants, and the Programme Coordinator;
- representing the programme across external organisations and networks, and sharing the findings and learnings;
- developing the short and long term monitoring and evaluation systems to support the capture of learning and impact;
- keeping the long term planning and monitoring of the programme in mind, with an eye to the place of each year's work in the broader aims and vision.

The three project teams

In parallel with recruiting the PSB clusters in the early part of the project, we recruited 6 associate consultants who were either already working with the Network, or expressed an interest in working with the Network on the PSBs programme. The consultants were paired

into project teams and matched to the 3 PSB clusters which made the final selection, by June 2021. Through the internal team meetings and supporting processes, the project teams connect with other teams and the wider programme, to bring context, support and additional resources into their work.

The associate consultants are freelance, and in year 1 were contracted to each spend up to 6 hours per week on this programme, roughly divided between 4 hours per week of direct PSB contact time, and 2 hours per week of internal team meetings and supporting processes. Each PSBs cluster had access to up to 1.5 days of consultant time per week. Having freelance associates (rather than employed) gives us the flexibility to respond to need while not overspending on unallocated capacity.

Between June 2021 and February 2022, the consultants working across the three clusters delivered:

- 850 hours of consultancy total (client facing and team time)
- 470 hours on client facing time (12 hours per week average across the programme)
- 380 hours on internal meetings and supporting processes (10 hours per week average)

These are lower than planned for, mostly due to a change in PSB clusters (from Powys to West Wales, see next section) which left the Powys project team inactive for several months. At the end of year 1, a stocktake of progress and underspend enabled us to raise the consultant time to up to 8 hours i.e. one full day per week per consultant, from year 2 onwards. This is equivalent to up to 2 days of consultancy time per PSBs cluster (up from 1.5 days).

Project teams	PSBs
Mike Corcoran Suzanne Iuppa	North Wales cluster: Gwynedd and Ynys Mon Conwy and Denbighshire Flintshire Wrexham
Rae Baker Jenny Mushiring'ani Monjero, then Andrew Diggle	Bridgend and Cwm Taf cluster: Bridgend Merthyr Tydfil and RCT (Cwm Taf)
Roxanne Treacy Vikki Butler	Initially Powys, then West Wales cluster: Ceredigion Pembrokeshire Carmarthenshire

In February 2022, Jenny Mushiring'ani Monjero (Bridgend and Cwm Taf project team) took the decision to step back from working on the Mes yn Dderw project. She also works part time for

the Cwm Taf Morgannwg Regional Partnership Board, and found herself pulled in different directions by her RPB role and her consultancy role with the PSBs. We had considered this risk when constituting the teams, but it had seemed worth a try, as she also brought established working relationships and connections across the region. By the end of year 1, while lots of good work had been built on those relationships, Jenny decided it was time to simplify her roles and concentrate on the RPB one. She stepped down from the project team and was replaced by Andrew Diggle, after a handover and induction period.

B. Activities with the PSBs / clusters of PSBs

In the first part of year one, we focussed on disseminating the programme information via our networks, and recruiting the clusters of PSBs we would be working with. We reached out through:

- our newsletter and social media accounts
- the WCVA network of third sector organisations
- the Welsh Government Third Sector Partnership Council via WCVA,
- CVCs Cymru
- Building Communities Trust's networks,
- the WLGA's networks,
- Natural Resources Wales,
- the Office of the Future Generations Commissioner,
- the NHS Confederation's networks,
- the Welsh Government PSBs network,
- via the supporters who wrote statements of support for the proposal,
- and by direct contact with known PSB partners in our networks.

We invited Expressions of Interest and posed 7 questions for interested PSBs to answer:

1. Who are you, and which PSB (or cluster) you are writing on behalf of?
2. Which other members of the PSB (or cluster) have you discussed this opportunity with, and who is on board? Does anyone have any questions or concerns?
3. What are you already doing in terms of engagement and involvement? What has your
4. approach been so far, specifically with regards to the Well-being Assessments?
5. What value would this programme add to your existing work, and how would it increase your impact?
6. Who would be part of the team we would be working directly with? Will they have capacity (of time, and of focus) to take on this work?
7. Is there buy-in and permission at senior leadership level to support and advance this work?
8. If you're a cluster, what are your arrangements and how well embedded are your collaborative practices?

We held informal interviews with all the PSBs who applied, to complement the written application and get a fuller sense of their context. (All the PSBs in Wales applied, either individually or as a cluster, except for Cardiff.) We selected three PSBs or clusters, and ensured that between the three, different geographies and populations/demographics were represented. We also chose so that those we decided to work with gave us the greatest opportunity to have an impact.

From June 2021, the project teams (our pairs of associate consultants) started developing relationships and scoping the work with their PSB clusters. They established project plans, focusing in year one on supporting the engagement for the Well-being Assessments, which were at the top of the priority list for the PSBs. Below we present a summary of the work achieved to date with each PSB or cluster of PSBs.

North Wales

The project team have been supporting the co-delivery of public engagement for the Well-being Assessments through 9 distinct activities, including: workshops engaging groups with protected characteristics, public surveys, awareness raising leaflets, infographics, and a wellbeing magazine designed by young people. Although this is not co-production yet, relationships of trust are being built, and officers' confidence is growing with regards to engagement with the public. Officers across the North Wales region are also connecting in collaborative relationships and starting to share information, for example about what engagement exercises are being carried out, to reduce duplication. The team estimate that year one activities represent a solid initial building block, with evidence of an appetite for co-production.

Cwm Taf & Bridgend

The project team shared theories and principles of innovative engagement approaches, which were well received by officers and staff who reported they felt enthused and hopeful. As a result of the sharing of ideas, the "100 day engagement approach" was adopted, to achieve focused progress at pace. The ambition was seen as very positive and a number of tools and techniques were deployed during the 100 days of activity, including the hackathon tool which was successfully used collectively by the team and officers. The PSBs achieved improved engagement with seldom heard voices, and the officers reported having some really positive conversations, which increased their experience and confidence. They reported that the activities really enhanced the Well-being Assessment.

Powys

The project team reported that the initial planning and preparation work went well. Key areas were identified for collaborative and co-productive working, and an Introduction to Co-production training was delivered with PSB members and officers (24 participants). However from early Autumn 2021, the project team identified that some internal

communication challenges were arising with and between officers. With support from the Programme Manager and Coordinator, they kept a watching brief on the issue, and attempted to resolve the tensions in order to proceed with the work as planned. They raised concerns internally about the poor communications between officers and key partners, and between members of the PSB. Unfortunately by the end of the year, Powys PSB contacted the project team to withdraw from the programme, as they felt they were unable to commit the necessary resources, citing work pressures and increased demand due to Covid-19.

The Programme Manager and the project team analysed the original Expressions of Interest responses and the initial shortlist to identify a suitable replacement within the programme. After a few months of proposals and negotiations, the cluster of West Wales PSBs (Ceredigion, Pembrokeshire and Carmarthenshire) were selected, with sign off achieved in early 2022.

West Wales

The cluster came on board near the end of year one, but progress has already been made. The setup phase is under way, with the project team developing relationships with key contacts and devising a strategy to work across the three PSBs together. The project will move into action / doing mode during quarter 1 of year two.

Reflections on one year of working with the PSBs

What we've done well:

- building trusted and supportive relationships with key contacts in each PSB / cluster;
- devising work plans that support the PSBs activities (e.g. the engagement phase for the Well-being Assessments) while moving them towards a concrete understanding of co-production and involvement;
- supporting them to deliver tangible engagement activities that draw on the values of co-production, which enabled a growth in experience and confidence;
- encouraging the development of effective collaborative relationships that will support co-productive delivery in the future.

What we want to improve on:

- continuing to reinforce our role as consultants offering advisory support and building capability in the PSB teams (we do *with* not *for*);
- enabling all the key actors to establish a solid common understanding of co-production and involvement;
- supporting PSBs to identify more opportunities for genuine engagement leading into co-production, and to plan this in from the start;
- sharing our work, the findings and the learnings more widely, across the network of other PSBs, and more broadly across the Co-production Network's networks.

C. Supporting activities (internal)

In order to support and strengthen the work taking place with the PSBs, we established internal processes that allow the project teams to share knowledge and practice; to develop monitoring and evaluation criteria; and to keep an eye on the longer term development of the programme over 5 years.

Weekly team meetings

All the consultants capture weekly updates into a central spreadsheet, about their activities, any challenges, successes and lessons learnt. This enables each one of them to take stock and reflect, and also builds up a 'corporate memory' which is useful to look back on for reporting purposes, as well as for inductions if a member of a team changes.

The whole team then meets weekly for an hour, in a semi-structured session that enables them to connect with one another as a whole team, as well as discuss any points of note from the weekly updates spreadsheet. The Programme Manager also brings agenda items for discussion and reflection. This is a valuable space for the project teams to listen and learn from each other; and for the whole programme team to support each other in planning and practice.

Support from the Programme Manager

The Programme Manager has also established a routine of check-in meetings with each project team separately, on an monthly rolling basis. This enables the team to share a status update focused more on their effectiveness and well-being, and raise any issues or concerns. The Programme Manager keeps an up-to-date sense of how the teams are doing and what support they might require.

Annual review one-to-one meetings are also being trialled in June and July 2022 with the individual consultants, to provide a space for personal reflection, and looking back to look forward. They will be modelled on the Co-production Network staff's monthly supervision sessions, and will cover performance review, professional development stocktake, and well-being check-in

Development of a monitoring and evaluation framework

We started to develop a monitoring and evaluation framework through a series of team workshops, mapping all the different kinds of impacts that we aim to achieve (for the PSB teams, their communities, the wider public services landscape, and our own team).

We have refined it to these 3 headers to begin with, which track both tangible outputs and changes in observable behaviours. The teams are reporting back on any signs of change against these measures in the weekly meetings:

1. Evidence of willingness, understanding and practice of co-production

We are looking for signs of:

- whether the individuals and teams we are working with have an improved understanding of co-production with stakeholders
- whether the individuals and teams we are working with demonstrate an increased practice of co-production with stakeholders
- whether the individuals and teams we are working with are supported by their PSBs or organisations to undertake this project

2. Evidence of increased meaningful community involvement in co-productive design and delivery of services

We are looking for signs of:

- communities being involved, not just engaged (“doing with” rather than “doing to”)
- whether there is an increase in co-production with communities in PSB projects or workstreams
- whether there is an increase in co-production with communities specifically mentioned in PSB project plans or proposals
- whether there is an increase in involvement and co-production specifically with people with protected characteristics
- improved and new relationships with communities that demonstrate continued co-production (i.e. feeding back to communities on progress, “closing the loop”)

3. Evidence of organisational culture change

We are looking for signs of:

- whether there is a willingness to work towards co-production at the highest strategic and decision making level of organisations
- whether there is a willingness to work towards co-production at all operational levels of organisations
- whether organisational policies and procedures reflect co-production principles
- whether there is an organisational commitment or investment in upskilling all staff and external partners
- whether PSB organisations are demonstrating more meaningful collaboration (i.e. with a focus on shared objectives)
- whether generally PSBs are referring to “us” and “our” (i.e. the PSB as one partnership), rather than their individual organisation within that partnership
- whether the PSB officers are empowered to take action without seeking levels of permission and sign off
- whether there is evidence that the culture of the PSB is changing to a more collaborative way of working
- whether (shared) PSB values are the basis for all PSB decisions and how activity is undertaken

The whole programme is informed by constant learning, driven by active reflection. The weekly reporting and meetings capture the incremental changes and small successes. Additional quarterly and semi-annual monitoring and evaluation sessions enable the teams to take a longer view and look for trends that might not be visible at a more granular timescale.

Horizon scanning and forward planning

In early March 2022, as a marker of the first year of the project, the whole team got together to think ahead to potential challenges and opportunities for the coming year (year 2) as well as the remainder of the programme.

Each project team put together a presentation covering:

- the wider context affecting the PSBs in general (e.g. policy and legislative, economic, social and demographic including Brexit and Covid)
- the potential impact specifically for each cluster
- a “pre-mortem” reflection: projecting themselves to the programme end date and contemplating an imaginary failure, what went wrong and what could be avoided
- forward planning for the coming month, quarter and year - and years 3 to 5

The exercise of collating the presentations was reported to be useful, and sharing the pictures from each project team with everyone else led to fruitful discussions and insights, influencing the ongoing planning and delivery of the programme. The team will continue to reflect and plan ahead together at key points.

Budget tracking and monitoring

The programme budget is tracked by the Co-production Network director as part of the monthly financial operations for the whole organisation, and reviewed quarterly with the Programme Manager for any insights and decisions.

For example, underspend has been incurred in year 1 due to a longer recruitment time and later start than anticipated (for both PSBs and the Programme Coordinator), and also due to the change in PSBs from Powys to West Wales which left the team inactive for several months. The underspend has been reallocated into:

- an additional project activity to support the Office of the Future Generations Commissioner with the narrative evaluations of the Well-being Assessments (see section F, below);
- increasing the available consultancy time per PSB from 1.5 days to 2.0 days from year 2 onwards.

Full budget details and adjustments are presented in section 5, below.

D. Sharing practice through newsletters and online events

While we are funded to work hands-on with 3 clusters of PSBs (we call them the “Green PSBs” for short), we are keen for all the other PSBs (“Red PSBs”) to also benefit from the programme. We connect with the wider PSB network and we share findings, experiences and lessons learnt,

through fortnightly "co-production notes" and monthly learning and sharing events. This also fits within the wider context of the Co-production Network's existing cross-sector community of practice, and remit of influencing change more widely across Welsh public services.

Fortnightly "co-production note" emails

The "Co-production Notes" are bi-weekly emails that share insights, practical tips and learning from either recent work with the Green PSBs as part of their well-being assessments, or broader co-production considerations and notes on implementation.

During year one, we have issued 25 Co-production Notes. The mailing list currently counts 60 individuals who are mostly PSB officers from the Green and the Red PSBs (and a few other people who have an interest in the content, from the Welsh Government and the Office of the Future Generations Commissioner for example).

We initially produced these mailings on a weekly basis, but the 'open rate' was very low. We hypothesised this could be due to the limited time that PSB officers have available to catch up with these emails alongside their daily work; we switched the frequency to bi-weekly but this hasn't made a significant difference on the uptake.

The e-newsletter could be entirely the wrong format to fit into most PSB officers' schedules, but it is so far difficult to ascertain what would be more suitable. (For example a survey wouldn't return significant responses due to already low uptake,) We are continuing to have conversations, build relationships and try new channels, while maintaining the fortnightly publication for the benefit of those who engage with it.

Monthly learning and sharing events online

In the summer of 2021, when the project teams were starting work with the Green PSBs, we planned and delivered a series of fortnightly briefing sessions to support the Red PSBs; and established a timetable for future sessions of learning and practice sharing.

These one-hour-long sessions now take place on a monthly basis. The aim is to provide a reflective space in which to share and listen to both consultants and PSB officers' experiences. To generate interest we plan and promote a programme of topics for discussion. Where relevant, we match the themes to the phases of work the PSBs are focusing on, for example specific engagement elements of the Well-being Assessments, or the publication of the Welsh Government's Future Trends Report. We are also scheduling some knowledge transfer sessions, around elements of the Future Generations Act and co-production training, in order to further develop a robust understanding of co-production and involvement.

Attendance has been lower than we'd hoped for so far (the lowest attendance being 2, and the highest 12). This is probably partially linked with the low uptake on the "co-production note" emails, where event dates and topics are announced. We are testing ways to improve participation by better leveraging a range of communications channels, including:

- Publishing the event dates on the Co-production Network website calendar
- Promoting the events across social media channels
- Sending calendar markers to the PSB officers registered on the distribution list
- Managing registrations via Eventbrite (instead of directly releasing the MS Teams link to the distribution list), where we can set up automated reminders to people who have registered
- Sending reminders to the distribution list separately from the content of the “co-production notes” (1 month and 1 week before)

We will continue to test and iterate our emails and events, while monitoring key metrics as indicators of success, in order to provide relevant content that supports the work of the PSBs.

Other events to share with our wider networks

We also want to share the work we are doing, and what we are learning, with our broader networks beyond the Green and Red PSBs who have joined our distribution list. Now that we have some valuable insights from our first year, we are beginning to publicise them through the following:

- **Co-production Network for Wales #CoproMonday event (March 2022):**
#CoproMondays are weekly 90 minute events for members of the Co-production Network for Wales. The usual format is to offer some facts, perspectives or insights as a conversation starter, then hold a space to discuss and reflect together, and relate the content to participants’ own co-production practice. In March the North Wales and Cwm Taf & Bridgend project teams shared learnings from the first year working on co-production and involvement in their PSB clusters.
- **Wales Co-production Week 2022 event (planned, May 2022):**
The Wales Co-production Week gathers a programme of co-production and involvement related talks, workshops and events, and is running in the week commencing 16th May 2022. We have booked in a session to discuss and reflect on our first year of co-producing with PSBs, which will be open to members of the Co-production Network as well as the PSBs network as a whole.
- **Gofod3, WCVA’s showcase event for the third sector (planned, June 2022):**
We have booked in to run a session and share our work with attendees from across the third sector at this year’s WCVA showcase event.

We will continue to seek opportunities to share this work either in events that we organise, or by invitation to other networks’ meetings and events. (See section E below, on linking up with other organisations and networks).

We are also considering developing written pieces for the recently refreshed Co-production Network website (a blog is now available) and other written channels.

E. Linking up with other organisations and networks

From the early stages of developing this programme proposal, we have been linking up with key partners and critical friends, including the Office of the Future Generations Commissioner for Wales, the Welsh Government team supporting the PSB officers, Building Communities Trust, Tempo Time Credits, Natural Resources Wales, ACE - Action in Caerau and Ely, the Wales Local Government Association, Renew Wales, and the Wales Council for Voluntary Action.

Through the inception and development of year one, we have continued to build relationships and share updates and learning with a number of organisations and networks.

Programme strategic group

We gathered a group of people who are interested in keeping abreast of developments in the programme, because they see links with or benefits to their own work, and who are keen to support where possible. This group has no formal governance or oversight role, but is helpful to connect the programme with other organisations at a strategic level. The group meets quarterly for one hour, so it is a light touch commitment but sufficient to keep everyone updated (both on programme developments, and each others' work).

The membership of the group currently includes:

- the Welsh Government (Local Government Partnerships team)
- the Office of the Future Generations Commissioner
- Social Care Wales (Community Resourcefulness Partnership)
- the Welsh Local Government Association
- Building Communities Trust
- Renew Wales

Organisations or people are added to the group organically on suggestion of current members or when we develop a new relationship which we think will benefit.

Welsh Government Network of PSB Officers

The Local Government Partnerships team in the Welsh Government supports a network of PSB officers and co-ordinators. We have been invited to contribute to some of their meetings, and to provide updates for the email bulletin.

Welsh Government PSB representatives

The membership of the PSBs includes a Welsh Government representative for each PSB, and there is an internal (to Welsh Government) network of officials who sit on PSBs across Wales.

We have been invited to attend meetings and provide programme updates in the past year, with an intention to attend future sessions for further updates.

Community Resourcefulness Partnership

Social Care Wales (SCW) supports and coordinates the Community Resourcefulness Partnership, in collaboration with Building Communities Trust (BCT), the WCVA and the WLGA. This group of stakeholder organisations was formed during the initial stages of the 2020 pandemic lockdown, to acknowledge and build on the grassroots action emerging from communities. This is an area of work complementary to the PSBs programme and the broader Co-production Network activity, and we have been keeping abreast of developments through informal contact with the key organisations, and through supporting the organisation of joint events in late 2021.

The partnership is currently developing its strategic plans for the future and the Programme Manager has been invited to join the CRP steering group, to support and shape its work, in light of the PSBs co-production and involvement programme.

Office of the Future Generations Commissioner for Wales

The Co-production Network for Wales is connected with the Future Generations Office through several formal and informal channels, and in the context of this PSBs programme, we have been updating the team on progress and connecting with their new structure of Public Body Points of Contact.

We proposed some support to the Office's team with reviewing the learning from the Well-Being Assessments. (See next section F, on additional programme activities).

F. Additional programme activities

We held conversations with the Office of the Future Generations Commissioner about the feedback the Office is providing on the Well-being Assessments; these have been the main focus of the PSB teams we have been working with this year due to the statutory obligations and deadlines involved. The Office's feedback focuses on highlighting good practice, and providing advice and guidance on moving from the Well-being Assessments to the drafting of well-being objectives and the development of Local Well-being Plans.

There is no statutory requirement or guidance which states that the Well-being Assessments must include a methodology, or report on innovative approaches and lessons learnt.

However, while this round of Well-being Assessments does not yet see PSBs operating in a fully co-productive way, progress has been made in terms of the quality of meaningful engagement and involvement. It would be valuable for the innovation, experimentation, ambition and embedding of the Sustainable Development Principles that have occurred in the

undertaking of Well-being Assessments across Wales to be appreciated and understood. Acknowledging and validating this progress will contribute to maintaining momentum, sustaining morale, and generating more meaningful advice and guidance.

Our consultants have designed a narrative-based evaluation process, to run in addition to the Office's feedback process. It is optional and has been offered to all the PSBs on a voluntary basis. Three have taken up the opportunity: Carmarthenshire, Wrexham, and North Wales as a cluster.

The process involves semi-structured interviews held by co-production consultants from our project teams, in collaboration with representatives from the Future Generations Office, to offer a space for reflection and for capturing the "how" of the PSBs engagement (alongside the "what" which is reported in the Well-being Assessments). The aim is to explore the experiences of the PSB officers, and to provide a safe space to reflect on the successes and challenges, to support the continued development of innovative best practice.

Outputs of the narrative-based evaluation will be:

- reflections on the ways in which PSBs have been facilitating meaningful involvement and moving towards co-production;
- advice and guidance on how PSBs can build continued progress through the drafting of well-being objectives and the development of Well-being Plans;
- co-production and involvement criteria (what we are looking for) for future reference.

We have been able to propose this additional activity which wasn't in the original programme plan, as we had some spare capacity due to the switch between Powys and the West Wales cluster. Our project teams took the opportunity to reflect on what would be useful support and input given the spare capacity we had available.



3. What we've learnt in year one

We present below the key learning points from the individual project teams and clusters (except for West Wales as work is about to start properly in the coming weeks), in addition to emergent themes that apply across the programme as a whole.

A. North Wales

“Small steps can lead to larger impacts”

~ Mike Corcoran, Suzanne Iuppa

We have dedicated time to building relationships and earning the trust of individual partners one by one, gradually helping them to come together as a cohesive partnership - which is a prerequisite for them to think about co-production in a strategic way.

Through the use of the existing Research and Insight Partnership (RIP) collaborative meetings, we have facilitated increased partnership working, and suggested a rotating Chair and note taker to share ownership of the meetings. The RIP is now established as a place to share good practice, data - including data pertaining to groups with protected characteristics - and insights across the cluster area. We have suggested an Agenda to look at 6 themes identified as key in North Wales (including engaging young people) over the first 6 meetings, with a view to then seeing if we need to change these themes.

Now, there is talk of a North Wales Engagement Network being established across the cluster, instigated by Betsi Cadwaladr University Health Board. This will be another place where we can work together for co-production.

Small projects with good results are excellent talking points. This could be one consultation, or an engagement survey done well. From the small examples of co-production we have shared with them, the RIP partnership saw a way they could start working together.

We can now point to many examples of the values of co-production having a direct influence on actions and activities all over North Wales (on a small, but meaningful scale). Confidence and ambition are growing, and a supportive infrastructure is emerging.

Key points of learning:

- An asset-based approach means starting from where you are (and giving yourself the time to develop from there).
- Small changes can accumulate to deliver large impacts.
- If the infrastructure to work together is not in place between partners - then a large-scale culture shift towards co-production and collaboration simply can't happen. It's an essential upstream investment.

B. Cwm Taf & Bridgend

“Have the right infrastructure in place and build relationships”

~ Rae Baker, Jenny Mushiring’ani Monjero, Andrew Diggle

The PSBs originally accepted our proposal for two workstreams to support their co-production journey over the next five years: one focusing on the Well-being Assessments in year one, and one maintaining the long-term view of the 5 year development. During year one we got a sense that the long term nature of the five year programme was lost, and all the focus and resources were given to the one time-pressured element (the Well-being Assessment). It is difficult to keep an eye on the long-term when there are strong short-term pressures.

The PSB co-ordinators, along with their Cwm Taf Morgannwg Regional Partnership Board (RPB) colleagues, launched a “100 Days of Engagement Framework” as a strategy for co-designing both the PSB’s Well-being Assessment, and the RPB’s regional Population Needs Assessment, with members of the communities in which they operate.

But a number of capacity issues were present within partner organisations and the regional workforce, which delayed the implementation of actions within the preparation stage. This meant that the Community Action Group (CAG) overseeing the process, did not formally launch until 40 days into the 100 day process. Once the CAG was established, activity continued to progress at a much slower pace than anticipated. Although some great engagement activities were carried out with seldom heard parts of the community, feeding in useful data to the PSB and the RPB reports, it remained difficult to develop and gain partner buy-in. Much more could have been achieved with the right infrastructure, buy-in, and planning.

The project team and their PSBs contacts are still going through the “forming” (discovery phase, getting to know one another’s ways of working), and “storming” (experiencing challenge and push back, overwhelm and frustration) stages of group development. Our project team are taking the opportunity brought about by the change in team composition to set fresh parameters and boundaries; the relationship seems to now be turning a corner. Establishing working relationships is a normal part of the project process and can take time. Resolution on this challenge is ongoing, but there is evidence of learning and building on what has been done so far; this aspect of the PSBs’ ways of working will form a significant workstream in year 2.

Key points of learning:

- Conflict is a normal part of transformation, and things will not always run smoothly; any process of this kind should be seen as a learning process, that has the freedom to evolve at its own pace.
- Relationships and the ways in which PSB infrastructure facilitates delivery is a common barrier to progress, evident in PSBs across Wales.

C. Powys

“Buy-in at a senior level is essential”

~ Vikki Butler, Roxanne Treacy

Whilst we had received assurances via the original programme application (expression of interest and informal interview) that the Powys PSB members were in agreement to engage with the process and work with us, it emerged that there was a lack of buy-in at senior management level within the Local Authority who were leading on the PSB's work, which affected working relationships with all the PSB partners.

We noticed early on that active and positive partnership work wasn't happening across the PSB, and PSB partners outside of the Local Authority were not dedicating their own resources to the PSB's activities. Local Authority PSB members and staff stated that they wanted external partners to participate, but didn't appear to communicate or operate in a way that enabled this to happen.

For our project team, the first few months felt like a constant clarification and negotiation process, with what we perceived to be a lack of appreciation of the support and expertise being offered on a fully funded basis. Despite clarifying and reiterating what support we were providing to the PSB as part of this programme delivery, senior management expected us to do the work for, rather than with, the PSB staff team. As a result, the PSB officers were not properly resourced or empowered to engage meaningfully with the programme, and were unable to make decisions pertaining to our work. The lead contacts were named rather than dedicated officers of the PSB, and this programme was perceived as an additional burden.

When the Local Authority informed us that they wished to step down from the programme, citing lack of capacity and Covid-related pressures, it became apparent that they had not consulted with other PSB members before deciding to end their involvement; nor did they inform other PSB members before they notified us.

Buy-in and commitment to a co-production approach is essential at a senior level, and this purpose should be clearly communicated and agreed with partners and stakeholder organisations that will be involved. Collaboration is a prerequisite for effective engagement with citizens and communities across a public board such as a PSB, and Powys PSB members must be able to engage with one another as a partnership. Our work as part of this programme could have begun to address this, but the opportunity was withdrawn before we could start.

Key points of learning:

- There must be active communication and partnership working, with a clear decision making structure, so that collaboration supports engagement and co-production.
- Management systems that don't allow for autonomy and decision-making within a defined role, inhibit progress.

D. Overall themes that emerged in year one

Across the programme, our consultants encourage the PSBs they are working with to regularly reflect on their co-production journey as an approach to continuous improvement. We often use the Plus/Delta rapid evaluation tool: what went well (plus) and what could be improved (delta). Our project team consultants use this technique themselves on a regular basis, as part of the weekly written reflection and team meetings.

Below are some of the themes that have emerged from our project team reflections, that apply across their PSBs and custers.

Growing the understanding of co-production and involvement

Across PSBs there is still a limited understanding of co-production and involvement, and what it looks like in practice.

We offered some co-production briefing sessions to the PSB officers network supported by the Welsh Government, in very early 2021 (prior to the start of this programme), hoping to instil some foundational concepts before they started their Well-being Assessments. However, given the complexity of the contexts they operate in, and the time pressures they have been under, our interventions have had a limited effect.

Learning from our Green PSBs specifically, it has been a challenging year due to the ongoing pandemic and other service delivery pressures. They have had to adapt quickly to online provision, with little time to plan and consider what approaches would work for them and their communities. This has resulted in a one-size-fits-all approach of utilising digital platforms such as Teams and Zoom for engagement, and traditional forms of communications such as surveys and emails. There hasn't been a lot of time, or headspace, available to consider a genuinely co-productive approach as well.

To a greater or lesser measure, our three project teams have all had to clarify boundaries with their PSB teams, who initially expected them to do the co-production work for, rather than with, them. The message that we have been sharing from the first, that our role is to accompany and support, and to build capability and confidence within their teams, bears repeating often for it to land - even when it is accepted in theory, in practice additional capacity is at the top of PSB teams' wish lists, and the hope that the project teams can shoulder some of the load.

A solid co-production and involvement practice isn't something that needs doing in addition to the usual workload, but is an approach that will facilitate the delivery of planned engagement and involvement (including helping PSBs meet statutory obligations). This isn't fully understood yet and will form part of the focus in year two.

Further co-production training will be delivered in June for members of our PSB learning and sharing network (Red and Green PSBs); reiterating the message now that they have seen some

practice first hand may enable the message to land differently. The session will cover the theory and practical examples again, and will aim for a shared understanding of co-production and involvement to underpin the development and implementation of the PSBs' Well-being Plans.

Establishing robust collaborative working as a prerequisite for co-production

Although each PSB presents slightly different situations, the three project teams have all raised thoughts with regard to partnership working. Whilst the expressions of interest to be a part of the programme had stated that they were all working well in partnership across their PSB members, the reality encountered by our consultants varied.

Information is provided by PSB members to other PSB members through reports and updates. There is little evidence of communication, sharing of information, and partnership working between meetings: members get together to report back and share updates, then go their separate ways until the next meeting. Building stronger collaborative relationships that run through the work of the PSBs as a constant would be beneficial; this requires some deliberate infrastructure changes such as networks of shared practice and space for collective reflection.

Due to their perceived capacity, there can be an over-reliance on Local Authorities to manage and complete the necessary work of the PSB; this imbalance means that workload as well as power are distributed unevenly across the PSB, which isn't conducive to collaborative working. In some situations, inequality in member relationships, poor communication between PSB members and practicalities - such as IT systems used by different organisations - have been impeding collaborative working.

Partnership working with external partners could also be improved, for example with Regional Partnership Boards. In one of the project areas the PSB and RPB joined forces to undertake their Well-being Assessment and Local Population Needs Assessment; while this required them to navigate some initial challenges, the aim was to reduce consultation fatigue in communities from duplication of engagement. This approach will continue to be explored.

Effective collaboration relies on both systems and behaviours. While it may seem that focusing on establishing good collaboration is far from our stated aims of working on co-production and involvement, effective partnership working is the foundation on which to build meaningful shared engagement, and starting to weave the co-production values through the work. A large part of year one has been dedicated to building relationships and trust with and between PSB partners, in order to support them to come together as cohesive partnerships. This focus will run through year two, with an expansion into engagement and involvement.

Planning in sufficient resources (time and skills) for co-production and involvement

The PSBs have limited resources to undertake their engagement obligations, and this has a strong impact on their ability to adopt co-production and involvement approaches in their

work. In some PSBs there are named, but not dedicated, PSB officers: their work on PSB matters is in addition to their usual duties, and is commonly considered a burden.

Time is their biggest limiting factor and it is understandable that they turn to our project teams with the expectation that we will add capacity by shouldering some of the engagement load and “doing for” them. In reality, we aim to add capacity through a solid understanding that co-production and involvement is about how you do what you do, not an extra workload; and through leveraging the underrecognised resources in their communities, by developing trusted relationships. With the scarcity of time and attention that the PSB teams are experiencing, this message has not fully landed yet and we are continuing to reinforce this and demonstrate it in action.

Across the board, the focus of the PSBs has been the Well-being Assessments in the past year, with all of their capacity and resources directed at the completion of this task. The result has been an inability to fully engage with the programme and consider longer-term co-production plans outside of the Well-being Assessment work. With the PSBs starting to move from the assessment phase into developing their Well-being Plans, our project teams are encouraging them to reflect on their co-production needs and opportunities on a longer term basis.

Another issue, linked to infrastructure, governance and decision-making processes, is that PSB officers in general tend to experience a lack of empowerment. The length of time it takes to make a decision, due to seeking sign off and approval from the body they represent, slows progress - and adoption of innovative approaches - considerably.

Finally, there are some gaps in skills and capabilities with regards to the design and analysis of meaningful engagement with a diversity of audiences, let alone co-production and involvement (with the shared decision-making and relationship building that these entail). In some areas dedicated engagement officers have been developing good practice which feeds into the work of the PSBs, and which requires only deepening and fine tuning to transform into co-production and involvement; but in others, a number of assumptions are leading to these roles being severely under-resourced, and basic engagement being poorly carried out. Combined with the lack of recognition of the importance of allowing sufficient time for engagement planning, this leads to poorly designed, and executed, engagement. Qualitative surveys for example can be considered to constitute sufficiently robust engagement, and engagement skills are thought of as being simple to pick up without any formal training and experience. As a result, poor survey design leads to low response rates and ineffective analysis, and officers rely on only one of two engagement channels to cover the breadth and depth of their communities. Penetration is low and the results fall short of being fully representative. We aim to improve the understanding of what data is needed and why, and build skills around different ways to collect it from a range of communities, in order to lead into deepening relationships and the possibility of co-productive conversations, especially with traditionally under-represented audiences.

Positive trends developing across PSBs

In year one our project teams have been building relationships with the PSBs, developing their understanding of the PSB partnerships, identifying the challenges of their respective project areas, and immersing themselves in the PSB working culture generally. Despite the challenges described above (and these themes are common in the picture of public services across Wales), there are also a number of positive changes and signs of progress to highlight:

- the ways in which PSBs have adapted to working virtually and through digital channels during the pandemic;
- a willingness to try more innovative engagement practices as part of the Well-being Assessments (e.g. 100 Days of Engagement, Hackathons);
- establishing frameworks to enable collaborative partnership working (e.g. regular newsletters, rotating meeting chairs on Regional Insight Partnership boards, etc.)
- an appetite for adoption of co-production and involvement in principle.

While we aren't underplaying the magnitude of the challenges, there are also seeds of positive practice, behaviours and attitudes to build on in the remainder of the programme.



4. Risks and challenges

The programme team recently held a horizon scanning session to consider potential risks and challenges to the programme over the next 4 years.

Alongside their own experience, learning and analysis, the team considered the [Picture of Public Services 2021 Report](#) from Audit Wales for an understanding of the wider context that the public services are operating in. The report summarises key trends in public finances and sets out some of the key issues for future service delivery, including key challenges and opportunities for public services in the coming years.

A. Risks and challenges for the PSBs

Factors in the broader public services context we need to be alert to that emerged from this discussion:

- The (as yet unknown) long-term impacts of Covid-19 (on the economy, on service security, on physical and mental health, and the risks of future waves).

- The potential alignments/tensions between Welsh Government and UK Government agendas, particularly post-Brexit, and national funding schemes (growth deals, City Region Funding, Levelling Up agenda). Early reports are of a significant reduction in public funding in Wales in the absence of EU funding.
- The cost of living crisis is impacting citizens and services.
- Linked with Covid recovery and the rising cost of living, is the situation of the housing market as a result of the pandemic. Two of the PSB cluster areas have seen a rise in the purchase of second/holiday homes, and a reduction in the availability of properties for long term let. This could have negative impacts on community cohesion.
- The opportunities and risks associated with a permanent shift towards remote and hybrid working models. There are both perceived and actual barriers to meaningful involvement, and to the building of relationships necessary for co-production. Online-only engagement cannot be the sole channel.
- The publication of the Well-being Assessments and the next phases of the well-being planning process (drafting of well-being objectives; development of Well-being Plans).
- Climate and nature emergencies (declarations and commitments; also including increased frequency of extreme weather events).

B. Risks and challenges for the project teams

The project teams assessed factors relating to their specific PSBs, which they will need to stay alert to.

There were concerns from the project teams across the board with regard to the ability of the PSBs to engage with the programme, given the factors highlighted above. A particular concern was that partnership working and the well-being planning agenda may be deprioritised if PSB members' attentions are diverted to more urgent crises.

In addition, the merging of the Cwm Taf (RCT and Merthyr Tydfil) and Bridgend PSBs into one cluster, and the re-organisation of health services in West Wales, are factors that the project teams anticipate may preoccupy their PSB members during the course of the programme.

None of the project teams' consultants are fully fluent in Welsh; this could potentially be a barrier to engagement with some PSB members and their communities. We considered this at the programme development stage and ensured that the programme team includes two fluent Welsh speakers in support roles across the board (the Programme Manager and Programme Co-ordinator), who can offer bilingual support wherever possible to enable people to communicate in the language of their choice. As an organisation the Co-production Network is also developing Welsh language commitment and action plan, to improve provision of co-production and involvement support through the medium of Welsh.

The West Wales project team are mindful that, being a year behind in the programme, they have not had the same opportunities to build relationships and networks, and learn from lessons during the planning stage and Well-being Assessment development. To mitigate this

they are undertaking desk-based research on the recent Well-being Assessment process, and holding conversations with PSB members to bring them up to speed.

C. Premortem analysis

We considered as a team what failure by 2026 might look like for the programme:

- The programme team loses the capacity to provide support to the Green PSBs.
- Breakdown in relationships between the project teams and the Green PSB clusters.
- Green PSBs don't receive the support needed from their project teams.
- No evidence of any co-production and involvement in the development and implementation of Green PSBs well-being plans.
- No evidence of any co-production and involvement in the broader work and approach of the Green PSBs.
- No sharing of good co-production and involvement practice with Red PSBs.
- No impact on the broader public services landscape in Wales.

Our mitigations to protect against these risks:

- We have a range of co-production associate consultants we can draw on for additional support. We have contingencies built into the programme funding to cover maternity leave, recruitment, etc.
- We will continue to engage in real conversation, communicate and listen. We focus on relationships as the foundational building blocks of any collaborative and co-productive work.
- We will continue to ensure our support remains flexible, responsive and relevant.
- We will keep checking the risks and challenges of this programme as part of our strategic planning, and build in contingencies.
- We will keep acknowledging the complex nature of this work, and adapting to developments as they unfold. We will keep learning and sharing together as a whole team to remain responsive and relevant.
- We will keep building our regular communications: with each other as a team, with people throughout our Green PSB clusters, with the broader PSB Learning and Sharing network (Green and Red PSBs), and with the community of practice of the Co-production Network for Wales.

In a nutshell, we will keep monitoring and evaluating our progress, we will keep iterating and being responsive to need, and we will keep communicating and modelling the values and behaviours that underpin co-production and involvement.



5. Financial and budget update

Taking stock of the programme budget and financials at the end of year one, we have a few areas of overspend, and some significant underspend which we have tentatively reallocated. Here is the link to the budget tracking spreadsheet, and below we present the analysis (over- or under-spend relative to original application budget) and proposed changes, for review and approval by our funding officer.

<https://docs.google.com/spreadsheets/d/1tY467ifJLDPtnfxMJtX5RAPKChLZZy2n2ldhomniGAE/edit?usp=sharing>

A. Staffing costs: underspent

1. Overspend on programme management

We had originally budgeted for 2 days (16 hours) between for Programme Manager and support from the Network Director, and realised in practice it wasn't sufficient, so we raised this to 2 days for the Programme Manager, and 4 hours of support from the Network Director per week.

Rachel Wolfendale took maternity leave from December, and we arranged a month of handover with Ena Lloyd as Maternity Cover, doubling up the salary costs for a month, and covering statutory maternity pay (SMP) as well as the Maternity Cover salary and overheads.

What we propose:

- We propose to use the contingency provision for year one (2% of budget) to cover SMP.
- For years 2 to 5 we propose to increase the budget on this category to allow for the additional staff time.

2. Underspend on associate consultants

Due to programme setup and PSB recruitment time, the work with the PSBs started in Quarter 3 (we had budgeted from the start of the programme). One of the PSBs dropped out in Quarter 4 (the project team accrued very few hours that quarter). Even using some of the available time to support the Future Generations Commissioner's Office narrative evaluation work, we're still very underspent. From year two onwards however, we will be back at full capacity.

What we propose:

- Between this underspend and the delivery costs which are much lower than anticipated, we propose to increase the associate consultants budget in years 2 to 5, to allow for up to 2 days of work per PSB cluster per week (up from 1.5 days) across the project team (2 consultants per PSB cluster).

3. Underspend on communications officer

The role of communications officer (actual job title Programme Co-ordinator) started in Quarter 3 due to programme setup and recruitment time (we had budgeted from the start of the programme. From year two this will be at full capacity.

What we propose:

- The original proposal allowed for a full-time role, covered for 4 days per week from the programme budget, and one day per week from unrestricted Co-production Network budget, to cover the time that the Programme Co-ordinator is spending being the bridge between the funded programme and the broader Network activities.
- The Programme Co-ordinator role is now a 30 hour per week role (because we recruited for 30-37 hours and the successful candidate was given the choice of hours on appointment.)
- To cover the setup and settling in time the Programme Co-ordinator role has been fully funded from the programme budget for year one (two quarters). We propose to fund them fully from the programme budget in year two, then to decrease the proportion of programme budget and increase unrestricted Co-production Network funding over years 3 to 5.
- This will enable us to transition to full unrestricted Network funding and retain the role in the team at the end of the programme.

4. Overspend on recruitment costs

Recruitment cost more than we had anticipated, this is down to lack of experience at the budget planning stage. This is a one off and had no negative impact on the rest of the programme.

5. Overspend on startup costs

We spent more on laptops than we had planned for, as we purchased 2 laptops to lend to consultants as an interim measure (in addition to the ones planned for the Programme Manager and Programme Co-ordinator). The equipment remains as assets in the team, and this spending has no negative impact on the rest of the programme.

6. Underspend on training

We have realised that a lot of the skills building and initial training in our staff team is actually delivered using in-house resources and without incurring additional costs.

What we propose:

- We propose to reduce the annual team training budget in light of this.

B. Overhead costs: on track

1. Underspend on accommodation (office space)

As we are a team distributed across Wales and without a central office, we had planned to hire meeting rooms and co-working spaces in order to meet as part of the programme activities. Due to Covid-19 restrictions however we haven't been able to.

What we propose:

- We propose to reduce the accommodation budget for years 2 onwards, and will keep monitoring the levels of activity and spending required.

2. Underspend on utilities

This category is underspent because we accounted for software costs (Google Workspace, MS365, Zoom accounts) in programme overheads, although we planned for them in this category. As a consequence, the programme overheads category is overspent by the same amount. Allowing for this mis-categorisation, we are actually on track on utilities and programme overheads.

What we propose:

- We propose to adjust the budgets for the utilities and programme overheads categories from year 2 onwards to account for this. Utilities will cover phones only, and programme overheads will cover digital accounts as well as accounting, HR and insurance.

3. Overspend on programme overheads

As per point #2, underspend on utilities, above.

C. Delivery costs: underspent

1. Underspend on marketing and communications

We budgeted this section based on an estimate of 5% of programme costs. However in practice, we found that we have the necessary skills in the team (particularly a Welsh speaking support team who can produce social media posts bilingually, with design skills for digital media and visuals). As a consequence our main outlay for marketing and communications is in core team staff time, and additional costs incurred are restricted to some professional translation. In the future some design costs may come into play for specific products (events or publications).

What we propose:

- We propose to reduce this budget category for years 2 to 5, and keep monitoring needs and spending.
- The unallocated surplus would go towards consultancy time in the project teams.

2. Underspend on travel

We had budgeted for the team members, who are distributed across Wales, to have to travel for internal meetings and work sessions, as well as to meet and work on-site with their PSB clusters. Due to the pandemic restrictions travel has been minimal, and video calls have replaced most in person meetings. With the lifting of restrictions a small amount of travel is being reinstated, but VC is still the mainstream mode of communication.

What we propose:

- We propose to reduce this budget category for years 2 to 5, and keep monitoring needs and spending.
- The unallocated surplus would go towards consultancy time in the project teams.

D. All other costs: on track

1. Contingency provision

What we propose:

- We propose that year one's 2% contingency provision is allocated to the programme management category to cover SMP costs.

2. Redundancy payments

This budget category is relevant in year 5 only for the end of staff contracts.

E. Ongoing finance monitoring and reporting

The programme budget is tracked by the Co-production Network director as part of the monthly financial operations for the whole organisation, and reviewed quarterly with the Programme Manager for any insights and decisions.

Financial reports for the whole Co-production Network, including the programme budget, are submitted to the Co-production Network board of directors who meet bimonthly. Any large decisions that affect the whole programme are submitted to the board for approval.



6. Conclusion

We're reasonably satisfied with our first year. While we're not exactly where we would have liked to be (but then we always had ambitious aims), we have dealt with challenges both internal and external, and adapted as necessary.

This first year has set a solid foundation to build on in years two to five and we look forward to reporting on continued progress.

