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# Evaluation of the Healthy and Active Fund Programme: Final Report



Cronfa Iach ac Egniol  
Healthy & Active Fund

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

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# Evaluation of the Healthy and Active Fund Programme

## Final Report

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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## Glossary

Acronym/Key word	Definition
Eoi	Expression of Interest
HAF	Healthy and Active Fund
IPAQ	International Physical Activity Questionnaire
MET	MET is a measure used for the IPA. It involves weighting each type of activity by its energy requirements (METs are multiples of the resting metabolic rate) to yield a score in MET-minutes. Further technical information available <a href="#">here</a> .
PAQ-C	Physical Activity Questionnaire for Children
RCS	UK Research & Consultancy Services Ltd
SRO	Senior Responsible Owner
SROI	Social Return on Investment
WAO	Wales Audit Office
WCVA	Wales Council for Voluntary Action
WEMWBS	Warwick-Edinburgh Mental Wellbeing Scale

## 1. Introduction

1.1 The Healthy and Active Fund (HAF) was launched in the summer of 2018. It was led by a partnership between three organisations and four partners - two Welsh Government policy teams (Health Inequalities and Healthy Communities in Health and Social Services, and Sports Policy Branch in the Culture and Sport Division), Public Health Wales and Sport Wales. The Programme allocated £5.85m<sup>1</sup> to 17 Projects which sought to improve participants' mental and physical health by enabling active lifestyles. The focus was on Projects which either supported those facing significant barriers to leading physically active lives, and/or strengthened community assets or harnessed the contribution of digital technology to influence behaviour change. The Programme specifically aimed to:

- Sustainably increase the physical activity of those who are currently sedentary or have very low levels of activity; and,
- Improve levels of mental wellbeing by promoting social interactions and increasing or improving access to spaces and places for physical activity.

1.2 In this Final Report of what became a four-year Programme we draw together material from across the period in a comprehensive Report. This opening Chapter introduces the HAF, explains the main contours of the Evaluation commissioned from RCS by the Welsh Government, and sets out the overall thrust and structure of the Report.

### **The HAF**

1.3 The genesis of the HAF Programme was in two separate Manifesto commitments<sup>2</sup> concerned with physical activity, wellbeing, and tackling loneliness and isolation. The consequences were threefold:

- They jointly had to be translated into practical intervention because they clearly overlapped and sensibly sat together in 'programme' terms;

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<sup>1</sup> This figure includes the grants originally agreed and additional funding for a one-year extension to projects (see paragraph 1.5)

<sup>2</sup> 'Together for Wales', Welsh Labour Manifesto for the Senedd Elections 2012.

- Achieving that was not easy, as it called for an unusual degree of institutional collaboration; and,
- However, the policy and Ministerial impulse which stimulated the HAF created an imperative which energised and focussed the officials charged with the responsibility of translating policy into practice.

- 1.4 The Programme also had a strong focus on generating evidence to understand which interventions could enable people to become active and improve their health and well-being into the long term. Key to the HAF and the Projects it funded was the sustainable development principle and the ways of working set out in the Well-being of Future Generations (Wales) Act 2015. Healthy and Active was a key priority in ‘Taking Wales Forward’ and in ‘Prosperity for All: The National Strategy’, where the aim was to *‘improve health and well-being in Wales, for individuals, families and communities, helping us to achieve our ambition of prosperity for all, taking significant steps to shift our approach from treatment to prevention’*.<sup>3</sup>
- 1.5 Initially, the HAF was a three year fund from April 2019 to March 2022, with an expectation that funding would be tapered in the final year. Funding was then extended a further year to March 2023 due to the Covid-19 pandemic that restricted planned implementation and local Project delivery processes.
- 1.6 Seventeen Projects were chosen from the applications received (see Table 1). The strong consensus amongst the HAF team was that many more than those 17 met the criteria and could have been funded.

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<sup>3</sup> [Programme for Government](#)



**Table 1.1: HAF Projects**

<b>HAF Projects</b> Project name, location, description and lead body	<b>HAF actual grant / (original proposed grant / total original proposed budget) in £000.<sup>4</sup></b>
<b>Actif Woods Wales</b> (National): Social Prescribing the Woodland Way. Woodland based activities and training for volunteers, groups, and health care partners: <i>Coed Lleol – Smallwoods</i>	£459 (£383 / £827)
<b>Babi Actif</b> (Northwest Wales): Support to parents to be active outdoors with their babies during the period from conception to age 2: <i>Eryri-Bywiol Cyf</i>	£232 (£211 / £261)
<b>Balanced Lives for Care Homes</b> (Southwest Wales): Improving health and wellbeing of care home residents in Swansea through physical and social activity in care homes for the elderly through volunteers and champions: <i>Action for Elders Trust</i>	£308 (£260 / £260)
<b>BeActive RCT</b> (Rhondda Cynon Taf): Involving people and communities to improve wellbeing - Multi-agency programme of accessible, person-centred sporting and physical activities in six communities with severe health inequalities: <i>Interlink RCT</i>	£472 (£400 / £557)
<b>Cyfeillion Cerdded Cymru</b> (South/Southeast Wales): Intense small walking group activity for older people: <i>Living Streets</i>	£271 (£224 / £255)
<b>Family Engagement Project</b> (South/Southeast Wales & Valleys): Community / partner activities for families in low-income areas: <i>StreetGames UK Ltd</i>	£475 (£399 / £694)
<b>Five Ways to Wellbeing</b> (Flint/Wrexham): Physical Activity to Promote Mental Wellbeing. CAMHS based service to deliver activity for young people with or at risk of mental health difficulty (community service): <i>Betsi Cadwaladr UHB</i>	£83 (£303 / £484) <sup>5</sup>
<b>Growing Together</b> (South/Southeast Wales): Food growing based inter-generational activities: <i>Keep Wales Tidy</i>	£295 (£289 / £289)
<b>HAPPY</b> (Newport): Tredegar House based activities for the young and those in poverty or disadvantage: <i>Tredegar House National Trust</i>	£228 (£280 / £309) & (£293 / £247) <sup>6</sup>

<sup>4</sup> The actual grant varied from the original proposed grant as a result of reductions or additions in light of Covid-19, and in respect of extensions and tapered funding in Year 4. Where total proposed budget is greater than original proposed grant, the additional funding was provided by applicants and their partners, sometimes in cash and sometimes in kind.

<sup>5</sup> The total actual grant is much lower than the original proposed grant because this Project ended early.

<sup>6</sup> In this instance both the amount sought and the amount offered changed during the application and approval process.

<b>HAF Projects</b> Project name, location, description and lead body	<b>HAF actual grant / (original proposed grant / total original proposed budget) in £000.<sup>4</sup></b>
<b>Healthy &amp; Active Newport</b> (Newport): Alliance of statutory and other bodies in Newport to engage in schools and communities: <i>Newport Live</i>	£460 (£374 / £564)
<b>Healthy Body - Healthy Mind</b> (Cardiff): Physical fitness and family activities for Black and Minority Ethnic women and their families: <i>Women Connect First</i>	£449 (£375 / £453)
<b>Opening Doors to the Outdoors</b> (Northwest Wales): Community based walking/climbing outdoor group physical activity to tackle mental ill health: <i>The Outdoor Partnership</i>	£285 (£230 / £353)
<b>Play Ambassadors</b> (Cardiff and Vale): Increasing play in ten communities by 60 recruited and trained Play Ambassadors: <i>Play Wales</i>	£216 (£179 / £197)
<b>Sporting Memories</b> (South Wales): Well-being through sporting reminiscence and activity: <i>Sporting Memories Network CIC</i>	£461 (£400 / £887)
<b>Super-Agers</b> (Cwm Taf Partnership): Community based physical activity for older people and those with disability or long term illness: <i>Bridgend County Borough Council</i>	£393 (£490 / £531)
<b>Welsh Active Early Years Programme</b> (National): Intensive community based play and physical activity for young people: <i>Early Years Wales (and Welsh Gymnastics)</i>	£442 (£371 / £394)
<b>West Wales Walking for Wellbeing</b> (West and Mid Wales): Walking Groups linked to GP Practices: <i>Pembrokeshire Coast National Park Authority</i>	£318 (£400 / £400)

1.7 The HAF was overseen by a Project Board with support from the HAF Evaluation Group and the HAF Delivery Group. The primary purpose of the HAF Project Board was to ensure that the Programme met its overarching aim to improve mental and physical health by enabling healthy and active lifestyles. The Evaluation Group oversaw progress and promoted the quality of the overall HAF evaluation and Project-level evaluations. The Delivery Group was tasked with ensuring a high standard and consistency in approach to the monitoring of all 17 delivery projects. It was supported by Case Officers allocated to all 17 Projects. They were responsible for monitoring their allocated delivery Project(s) through developing a detailed understanding of the project, and providing ongoing advice and support on governance, financial issues, delivery plans, evaluation queries, risks and

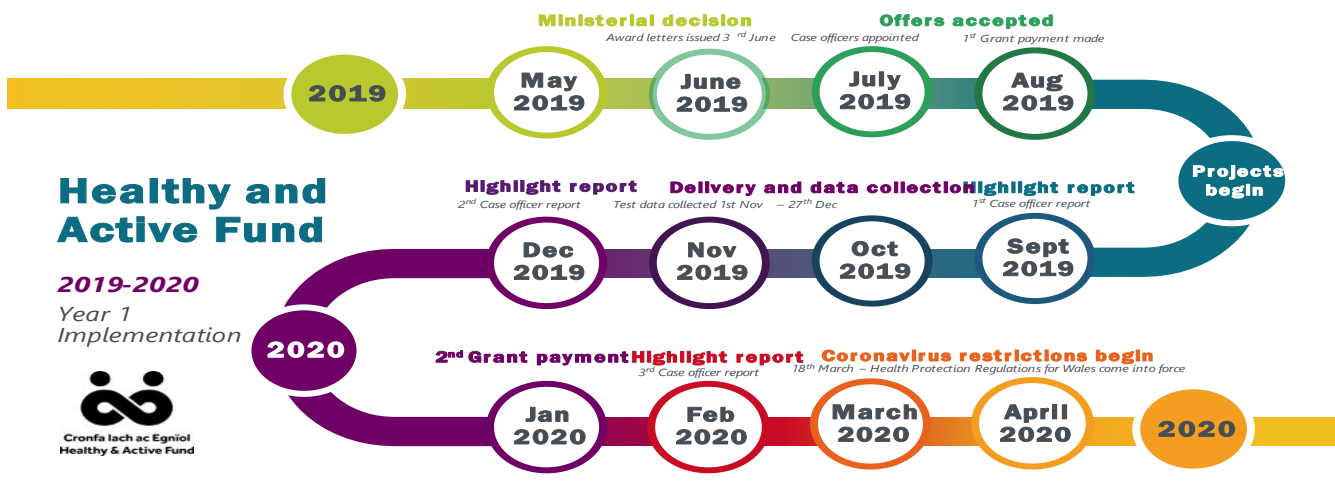
challenges. They also fed back regarding reports. Each Group and the Case Officer roles had representation from all three partner organisations.

1.8 The HAF timeline is set out below. The original three-year term was extended in light of Covid-19, with supplementary funding available which the majority took up. One project (Five Ways to Wellbeing) was terminated because of pressures on its sponsoring organisation, Betsi Cadwaladr UHB, and another (Super-Agers, sponsored by Bridgend CBC) decided not to continue with funding past year three because they considered that by then the activities were already mainstreamed within the Council. So ultimately 15 of the original 17 Projects saw the Programme through to its funding conclusion in spring 2023.

Figure 1.1 Healthy and Active Fund timeline 2018-2019

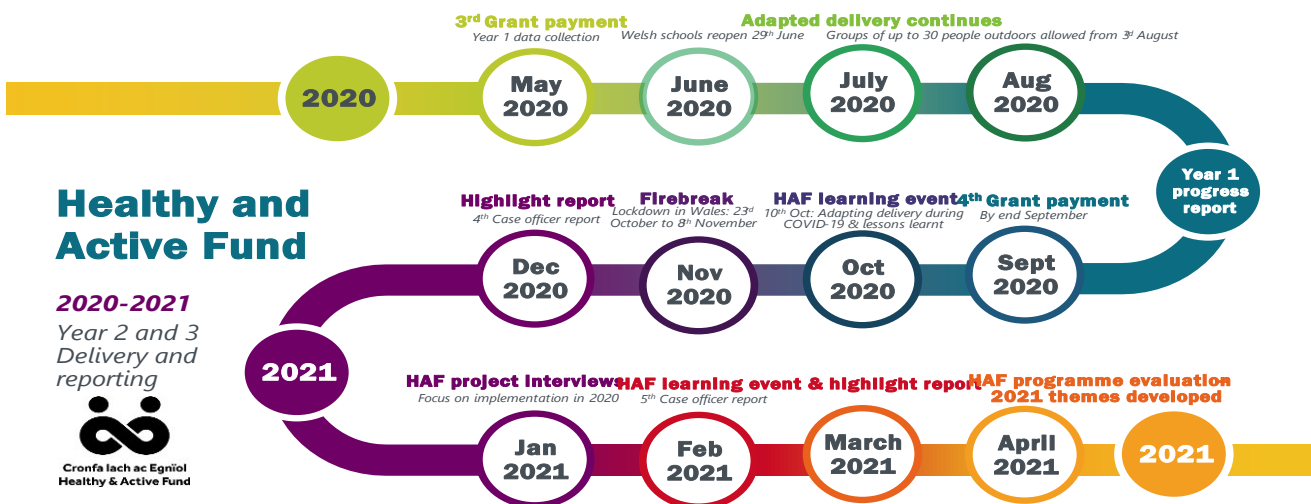


Figure 1.2 Healthy and Active Fund timeline 2019-2020



1.9 By summer 2019 the Projects were approved and grants were awarded, but by the end of the 2019-20 financial year, Covid-19 had struck and most Projects were radically re-thinking delivery and operating models to enable them to continue and, as far as possible, satisfy the objectives that had been set.

Figure 1.3 Healthy and Active Fund timeline 2020-2021



1.10 During the year that followed the Projects were, if they wished, able to extend in order to minimise the effects of Covid-19, and almost all took advantage of the opportunity. Delivery then continued through until March 2023.

Figure 1.4 Healthy and Active Fund timeline 2021-2022

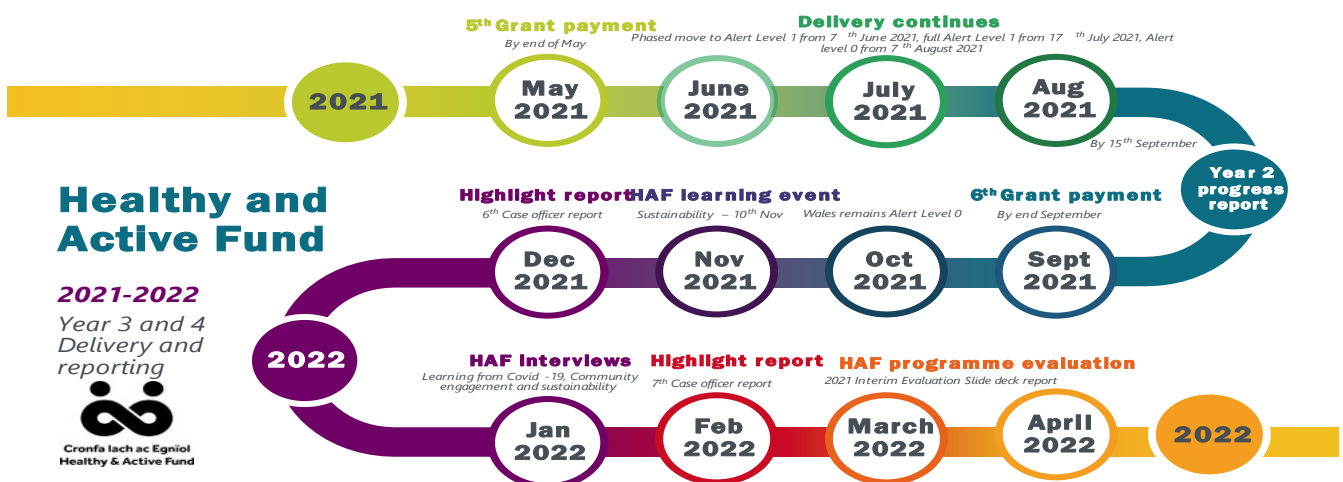
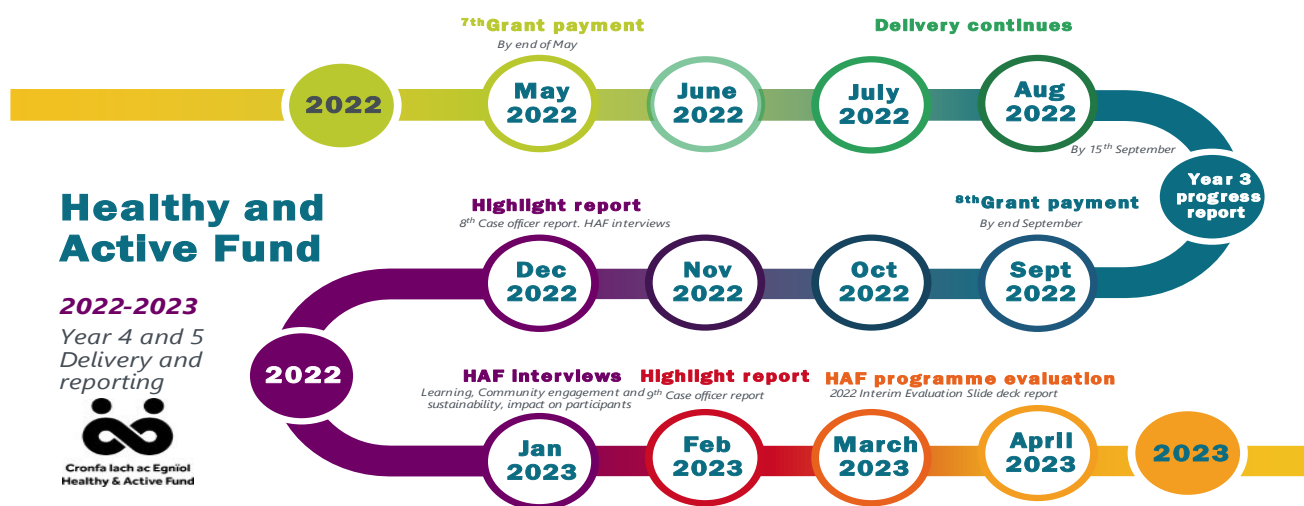


Figure 1.5 Healthy and Active Fund timeline 2022-2023



1.11 Thereafter, by June 2023, Project Highlight Reports had been submitted (due February), data returns for years 1, 2, 3, and 4 were provided (due May, to be followed by year 5 data in June 2024), and Ene Fund Project and Evaluation Reports were all due (June). The follow-on Sustainability Evaluation by UKRCS commences in May 2024, and will be completed by autumn 2024.

## The HAF Evaluation

- 1.12 In 2019, the Welsh Government commissioned RCS to evaluate the HAF at Programme level, with separate evaluation arrangements being implemented at Project level, resulting in one Programme evaluation and 17 Project evaluations. The Project level evaluations were commissioned or undertaken by the Projects themselves. The Projects' experiences of undertaking evaluation have been the subject of separate research undertaken by Public Health Wales.
- 1.13 The Programme encouraged monitoring and evaluation at Project as well as Programme level from the outset through the application process, with application guidance stipulating that proposals would need to set out monitoring arrangements and proposals for how the applicant intended to undertake an evaluation of the Project and its impact<sup>7</sup>. Individual Projects collected data on participants' levels of

<sup>7</sup> Healthy & Active Fund – Call for Applications and Fund Guidance – October 2018

physical activity and/or mental wellbeing, based on an evaluation toolkit and guidance issued by Public Health Wales as part of the Programme requirements.

1.14 The aim of our **Programme level evaluation** was to establish how well this type of fund can identify and support Projects to make a difference to physical activity and mental wellbeing. It was designed to determine whether a similar funding mechanism should be used again and identify lessons for programme design and delivery and included three elements:

- Theory of Change - to provide a framework for the evaluation;
- Process Evaluation - to assess the design and delivery of the HAF, help understand the outcomes, and identify lessons; and,
- Outcome Evaluation - to collate participant-level data, assess if the HAF achieved its aims, and identify the lessons that can be learned from it and ways to secure a significant legacy.

1.15 **Programme Evaluation Method:** There have been four stages to our work:

**Stage 1: Marshalling, Inception and Theory of Change:** This stage involved an examination of Programme and Project documentation to determine if there was an emergent or implicit theory of change, interviews with Project Board members, Project Leads and Case Officers, with a workshop to test and develop a retrospective and forward looking theory of change. This stage resulted in the following published report, which also provides further detail on methods: [Partners in Progress. The Healthy and Active Fund and its Theory of Change](#).<sup>8</sup>

**Stage 2: Initial Process Evaluation and Early Findings:** This stage involved a review of Programme and Project documentation; interviews with members of the Project Board, Evaluation and Delivery Groups; interviews with Project representatives and Case Officers, and with Project staff responsible for the administration of the grant; plus, some organisation representatives who were unsuccessful in their application to HAF. It also included an online survey of applicants. This stage is covered in the following published report, which also

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<sup>8</sup> UKRCS, (2021a)

provides further detail on methods: [Making Change Happen. The Healthy and Active Fund: A Process Evaluation](#)<sup>9</sup>

**Stage 3: The ‘Delivery and Learning’ Stage:** Pre-pandemic, the period from January 2020 to December 2021 was designated as the ‘delivery and learning’ stage of the work. Subsequently, this delivery and learning stage was extended by a year until December 2022 to take account of the Programme extension due to Covid-19. During this stage, as well as continuing to evaluate the post-funding award process and identifying emerging good practice and project related trends, areas of thematic study were identified. Methods included:

- An initial round of re-engagement interviews with Project representatives in early 2021.
- Selection of thematic topics by the Project Board, covering (i) the impact of and learning from the Covid-19 pandemic; (ii) approaches to and the effectiveness of community engagement; (iii) learning; and, (iv) the sustainability and scalability of projects and/or project activities and outcomes.
- Development of topic guides to cover these themes, and more generally.
- Delivery of lengthy semi-structured interviews with each Project, in both 2021 and 2022.
- A review of Project Highlight and Annual Reports from 2021 and 2022.
- A series of semi-structured interviews with Programme level actors including Project Board and Evaluation Group members, and Case Officers in both 2021 and 2022.
- Literature reviews to inform particular aspects of the evaluation, including the themes of sustainability and community engagement.

We provided Interim Reports for 2021 and 2022, and the findings from those reports are incorporated in this Report.

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<sup>9</sup> UKRCS, (2021b)

**Stage 4: Completion Stage:** This stage involved drawing together everything that has been produced since May 2019 and assessing where further work was needed to ensure that all the research questions were answered. We deployed a range of research methods, including a further round of 26 online semi-structured interviews with Project representatives and a selection of their partners; a further round of on-line semi-structured interviews with Programme Representatives and all Case Officers; a documentary review (of Project Board papers, application materials, Highlight, Annual and End Project Reports, and Project-commissioned evaluations); case studies (including of activities, organisational development, project delivery methods, and outcomes/impacts); and analysis of the monitoring data that Projects submitted to Welsh Government over the four years of the Programme.

We used the thematic studies to help structure the analysis, and also drew on the elements of the theory of change models we had developed to marshal and analyse the evidence at Programme level, in particular.

1.16 This Final Evaluation Report brings together previously published and new material into one document and makes an overall assessment of Project level achievements and Programme level effectiveness. It is organised broadly chronologically and is set out as follows:

- Chapters 2 and 3 summarise the early work on the [HAF Process Evaluation](#) and the [HAF Theory of Change](#). They are important to provide a yardstick against which to assess Programme effectiveness and its causes.
- Chapter 4 evaluates the core delivery years of 2021 and 2022, when Projects had got fully underway and made their 'Covid' adjustments to delivery and operating models.
- Chapter 5 provides a summary of the analysis we undertook of key themes chosen by the Project Board: community engagement, sustainability and the learning process.
- Chapter 6 provides our overall assessment of the Projects, including the collation of Project level standardised and other data, and the presentation of brief Project summaries outlining each Project's aims, activities, costs and



achievements. (These are drawn from extensive slide decks developed for each Project using a standard template which facilitated cross-Project comparison between what were very disparate Projects). We also draw out further themes from this material, including the crucial question of whether, overall, the Projects achieved what they set out to do and were grant-aided to accomplish, including various dimensions of impact.

- Chapter 7 is an overall assessment of the HAF Programme. It takes as its cue the Theory of Change adopted by the Project Board for the period from when the Projects were fully underway. It marshals the material under three main headings: project and programme management, learning and policy transfer, and 'ways of working'.
- Chapter 8 contains our conclusions and recommendations.

1.17 The strong and unifying theme of this Report is 'learning', for that was the core of our original commission, and core also to what the HAF itself was focused on. Each Chapter contains important learning points. These are the long term value of the HAF and therefore warrant prominence and reinforcement.

## 2. The HAF Programme Process Evaluation

### Background

- 2.1 The overall evaluation requirements for the HAF Programme included a Process evaluation that would assess its design and delivery, contribute to understanding the initial Programme-level outcomes, and identify lessons for how the HAF process could be improved. The aims were to assess:
- How well the HAF’s design and delivery enabled it to identify suitable Projects and support them to achieve the overall aims, and what the barriers and facilitators to that were;
  - How the HAF shaped the design and delivery of Projects (e.g. their scope, collaborations, capability of staff, monitoring and evaluation, risks and sustainability);
  - The views of Projects on the HAF and the way it shaped their work;
  - How well the collaborative approach to the design and delivery of the HAF by Public Health Wales, Sport Wales and the Welsh Government worked, and what the barriers and facilitators to that were; and,
  - How well the ‘five ways of working’ were embedded in the design and delivery of the HAF, including at the Project level.
- 2.2 A process evaluation report [Making Change Happen](#) was published in March 2021<sup>10</sup>. This covered a period from the Programme’s inception, through to the first phase of delivery in late 2019. Methods used included interviews with Programme representatives, a representative from each Project, Case Officers and a survey for all applicants regardless of stage reached. A small number of interviews took place with unsuccessful applicants.
- 2.3 In this Chapter, we summarise and reflect on the process, design and implementation of the Programme through the following sections:

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<sup>10</sup> UKRCS, (2021b)

- Programme design - how its structure shaped the design and delivery of Projects;
- Views of Projects;
- The collaborative approach and ways of working; and,
- Learning points from the process.

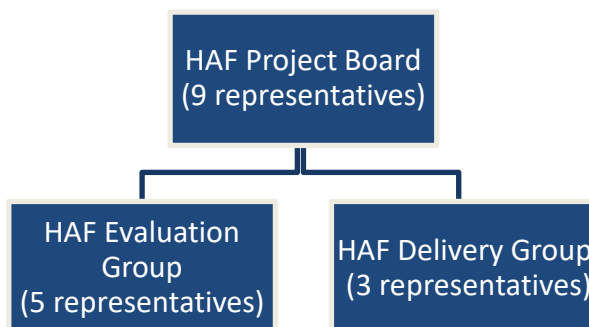
### **Programme Design**

2.4 The HAF Programme was developed from two manifesto commitments: *Taking Wales Forward 2016-21* included a commitment to introduce a Well-being Bond aimed at improving mental and physical health and reducing sedentary lifestyles, poor nutrition and excessive alcohol consumption. The commitment was repeated in *Prosperity for All: the national strategy*, stating that it would support innovative, community approaches to encourage more active lifestyles and healthy nutrition. In the 2018-2021 [Sport Wales Remit letter](#), the organisation was tasked with the development of a challenge fund and exploring a partnership with Public Health Wales.

#### *Leadership and Governance*

2.5 From the outset, governance structures and reporting arrangements were clear. Oversight for the Programme was undertaken by the HAF Project Board co-chaired by senior Welsh Government officials from Health and Social Services and the Culture and Sport Division. The HAF Evaluation Group and the HAF Delivery Group provided support and report to the Board. Some individuals were representatives of more than one group. Figure 1.1 shows the Governance structure and number of representatives at the start of the HAF funding period.

**Figure 2.1: HAF Governance structure**



Source: *Welsh Government Paper: Terms of Reference, Governance arrangements and roles and responsibilities for the Healthy & Active Fund partner organisations June 2019. Number of representatives added by RCS.*

- 2.6 Role descriptors and terms of reference were developed for the different groups and a regular programme of progress reporting was set out upfront and shared with Projects. Guidance on monitoring and evaluation was prepared and shared with Projects who reached Stage 2 of the application process. Once the final awards to the 17 projects were made, Case Officers were assigned to each Project to be the first point of contact. Each of the partner organisations was represented on each group from Board through to Case Officer support.

#### *The Application Process*

- 2.7 On 19<sup>th</sup> July 2018, the HAF Programme was announced as a new grant fund alongside the launch of the [Vision for Sport in Wales](#).
- 2.8 There was a call for applications in October 2018, with a deadline for applicants to submit an Expression of Interest (Eoi) in November 2018. Anticipating a great deal of interest, this Eoi stage was used as a filter to short list potential projects. A total of 109 Eois were received, and 43 Projects were invited to submit a full application and business case by February 2019.

#### *Marketing and Promotion*

- 2.9 The design of the process gave careful consideration to maximising the chances of receiving quality, innovative proposals from a diverse range of applicants. Initial marketing and promotion was consciously shaped to support collaborative

approaches. A logo was commissioned that portrayed a connected approach rather than using the three organisations' logos. A communications plan identified a range of channels that were to be used to ensure that prospective applicants would be made aware of the opportunity. These included a series of face to face roadshow events and a webinar hosted by the Welsh Council for Voluntary Action (WCVA). Social media channels – primarily Twitter and Facebook – were also used, with posts from Welsh Government and partner organisation accounts. In addition, the HAF was promoted in existing third-party newsletters and emails to potential applicants using third party contact lists<sup>11</sup>.

### *Applicant Support*

- 2.10 Roadshow locations were chosen to enable a good spread of attendance and to be accessible from all parts of Wales. They were designed to give a 'flavour' of the approach rather than detailed guidance/criteria. At this stage, the assessment criteria and selection processes were still being developed, and the roadshows were used to gather views to inform the guidance. The roadshows workshops specifically referenced the five ways of working including in particular collaboration, innovation and sustainability<sup>12</sup>.
- 2.11 Demand from potential applicants for support was high. For example, between the roadshow events commencing on 28 September to when the EOI stage opened on 15 October, 74 separate email queries and over 20 telephone conversations were logged by the HAF lead seconded to Sport Wales.
- 2.12 The application process was set up by the Sport Wales Grants Department on their online grant system<sup>13</sup>. Further guidance and support were provided for the final 43 Stage 2 applicants, and they received presentations on the 5 Case Business Model template to be used in the final application, and on the proposed monitoring and evaluation arrangements. This included how to create logic models in order to

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<sup>11</sup> Draft Healthy & Active Fund Communications Plan

<sup>12</sup> The five 'ways of working' are actually long term, prevention, collaboration, involvement, and integration. The sustainable development principle is the overarching concept of the Act.

<sup>13</sup> The system used was the CC Grant Tracker, now known as the Symplectic Grant Tracker. The HAF Programme was the first time Sport Wales used a two-stage online process – other programmes had involved one stage, or an offline Eol.

support the individual Project-level evaluations, and how to set out the baseline data and meet the attendance monitoring requirements. A Monitoring and Evaluation Toolkit was then issued by email, providing further details on the approach and listing additional sources of help and advice<sup>14</sup>.

## **The Assessment Process**

### *Process and Timeline*

- 2.13 Designed collaboratively by all HAF partners, the assessment criteria set out for applicants and assessors were clear and detailed. Panel members (assessors) were recruited from all three partner organisations. The 109 EoIs were split between six assessors who were selected to provide different perspectives, including health innovation, health improvement, education, the outdoor sector, and sport.
- 2.14 A partly different set of assessors was used to look at the full Business Cases, which were the heart of the Stage 2 application process, because it was recognised that particular areas of expertise were needed and to deal with the volume of work. The full applications ranged from around 50 pages to 200 plus pages, clearly requiring a significant time commitment to read and review, compare and score. The strategic and financial case sections of the Business Cases were assessed by Sport Wales and Public Health Wales, and the economic, commercial and management case sections were assessed by Welsh Government.
- 2.15 Panel members who we interviewed felt well supported and considered that the process had been flexible enough to adapt as suggestions and learning points emerged and were acted upon to improve the quality of decision making. For example, panel members were cautious about making decisions based on scores that were awarded independently on the basis of just a sample of the applications. This had been done to avoid assessment fatigue and to minimise workload. However, it was raised in a panel meeting as a concern, and so each application was scored by two assessors who then paired up to discuss and review any discrepancies. This approach no doubt helped to mitigate possible later challenges

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<sup>14</sup> Healthy and Active Fund Project Evaluation Toolkit, January 2019.

on scoring, but it placed additional burdens on the HAF team and depended on additional work out of hours, and the goodwill and conscientiousness of the staff involved.

- 2.16 The HAF team and the assessors understood that the process could subsequently attract a high degree of scrutiny, for example from unsuccessful applicants. There was also a sense of responsibility that this new fund was somewhat 'out of the comfort zone', especially in the willingness of the HAF team to choose Projects which involved taking risks and trying new approaches. As described by a member of the HAF team:

*'During assessment, members were constantly reminded that they were looking for different approaches, and to think about how things could work, maybe not just the proven approaches. As long as the application could explain clearly the thinking behind it.... It was OK if it 'might' work not 'would'. We had to keep reminding panel members that'. (Member of HAF team)*

- 2.17 The HAF was designed to allow more risk taking than previous Programmes which the HAF team members had been involved in:

*'...we wanted to spread communication more widely than usual and to reach out as far as possible – to organisations with good ideas that hadn't had funds to take them forward. So, they might be working on small pilots to scale later. Ministers were content with the approach and wanted to ensure the fund allowed Projects and organisations to learn about failures, to have the freedom to take risks'. (Member of HAF team).*

- 2.18 There were explicit discussions about the risk of making assumptions when reading applications from existing partners. They understood the potential for bias to topics or partners they were familiar with, or to assess less well on themes they were less familiar with. Assessors adopted the discipline of assessing the applications only on what was written in the application. The process brought in a broad range of views and questioning that may not have arisen if assessment had been the responsibility of just one partner organisation.

2.19 The Programme leads did perform a quick reliability test on a random sample of the 42 business case applications and the results from that exercise were reassuring. The end product was the selection of 17 Projects which were signed off by the Project Board in March 2019. Ministerial sign off was secured and Project applicants were notified of the decision in June.

2.20 Table 2.1 below shows the stages and extent of applicant involvement.

**Table 2.1: Number of applicants and stages**

<b>Application Stages</b>	<b>Number of attendees/applicants/Projects</b>
September 2018: Roadshows	260 attendees (not including webinar participants)
October 2018: Call for applications - Expression of Interest	152 enquiries received 109 Eols submitted Total value of applications – £20m+
January 2019: Stage 2 Full application	43 Projects invited to submit a full application Total value of applications - £12m
June 2019: Decision	17 Projects awarded funding £5.4m <sup>15</sup> , with a total project value of £7.7m

*A Range of Target Demographics*

2.21 Alongside the overarching programme aims, the HAF had sought to target four demographics (children and young people up to 24 years of age, people with a disability or long-term illness, people who experience poverty or disadvantage, and older people and those around the age of retirement from work). It also sought to achieve a balanced geographical spread, with the Valleys Task Force area being specifically mentioned.

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<sup>15</sup> The total final grant disbursed was higher as additional funding was made available for a one-year extension to Projects



2.22 The overall design and delivery of the HAF enabled it to identify a broad range of suitable Projects that had good coverage across Wales and across the target areas. Target groups were broad. Table 2.1 shows the number of projects focussing on different target areas and audiences. Projects generally focussed on more than one target audience and area.

**Table 2.2: Target areas**

<i>Target demographic</i>	Number of Projects
Children and young people up to 24 years of age	10
People with a disability or long-term illness	6
People who are economically inactive or who live in areas of deprivation	9
Older people and those around the age of retirement from work	9
All ages	4
<i>Type of activity</i>	
Physical activity	12
Sport and physical activity	5
<i>Desirable project coverage</i>	
Within the Valleys Task Force area	6
Seeking to strengthen community assets	14
Exploring and harnessing the contribution of digital technology	6

*Workforce implications*

2.23 When governments create grant aid Programmes such as the HAF, they necessarily have to manage some potentially tricky challenges of administration and relationships. On the one hand it is essential that there are a sufficient number of bids of appropriate quality to justify spending the resources allocated to give effect to the intended Programme goals. To not do so would almost always be regarded

as a failure, even if that meant that some public money was thereby saved. At the same time, where the number of applications is much greater than can be accommodated by the funds available, there is a high risk of substantial wasted effort on the part of applicants who are likely to be ill placed to ‘squander’ precious energy and time in doing so, with some collateral risk to goodwill and to ongoing relationships. Alongside this are the implications for decision-makers. The team delivering the HAF process was small, and the HAF Programme was not their sole area of work. Getting the balance right is a basic design challenge in grant aid Programmes of this kind. There was a recognition that the interest in the HAF was higher than expected, and the amounts bid for greatly exceeded the available funding. The subsequent and main filtering process took just under 40 per cent of EoI applicants through to Stage 2. Given the rigour of the Business Case requirements, the HAF Delivery Group had expected to see around half of those invited to submit a full application do so. However, by closing date 42 of the original shortlisted 43 applications all submitted a business case<sup>16</sup>. The strong consensus amongst the HAF team was that many more than those 17 Projects met the criteria and could have been funded. Our review of the documentation supplied by applicants confirmed from our standpoint that the successful bids were thorough and detailed, and clearly geared to the declared aims of the HAF.

### **Views of Projects**

- 2.24 The HAF as a programme and its principles were welcomed. Projects saw a need for it – one commented that it was *‘a breath of fresh air, it is an example of innovation within the funding environment. This type of thinking has been harder to come by previously’*. Another reported: *‘We feel our innovative ways of working over the last decade have finally found their moment!’*. (Project representatives)

#### *Views on the application process*

- 2.25 Views on the application process and subsequent stages among successful and unsuccessful applicants were mixed. Even organisations experienced in preparing

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<sup>16</sup> The remaining applicant was a partner in one of the 42.

grant applications found the overall demands of the process very challenging, but successful Projects recognised that it had given them the foundations to get underway more effectively. Successful Projects raised the time taken to notify decisions and release funding as a concern (although this issue was outside of the control of Programme actors) and this had some knock-on effects to planned recruitment and getting delivery underway.

2.26 Eol stage (Stage 1): The application documentation at Eol stage was felt to be clear and straightforward, and typical of applicants' expectations for such a grant. Over half of the applicants responding to our survey were satisfied with the Eol guidance and the ease of completing and submitting the form via the online grant system. There was less satisfaction with the time taken in the notification of decisions and the helpfulness of the feedback process. Around three quarters of respondents found this Eol stage 'very easy' or 'quite easy' and there was little difference between the opinions of successful or unsuccessful applicants, or by organisation type.

2.27 Stage 2: There were mixed feelings about the capacity among applicants to deal with the process. The deadlines and the requirements were considered quite burdensome, even where the organisation was familiar and experienced in preparing bids. Several Projects noted that the two stage process was familiar to them as it was used by the Big Lottery Fund – while noting that Big Lottery also offered more flexibility and tailored support. One successful applicant noted that the process took around three weeks, and others noted that developing effective relationships and joint plans required a good deal of time investment which although key, was in some cases a challenge when the organisation had a small number of staff members. As one respondent put it:

*'The Business Case was quite an onerous process, and I am concerned that you have to have had quite a bit of experience to complete such a form or a dedicated funding/bid writing person within an organisation. I feel that this potentially limits the organisations that are able to apply from a third sector perspective and favours the larger organisations as opposed to smaller grass roots organisations'. (Project representative).*

- 2.28 This was supported by survey feedback, with almost two thirds of third sector applicants stating that the requirements of the application process were not commensurate with the amount of funding available. This compared with under a third of public sector applicants, where the majority considered the requirements were 'about right'. There is perhaps a 'critical mass' issue here, as the bigger players have the capacity needed and experience of writing bids.
- 2.29 Decision making process: The level of disappointment for unsuccessful applicants was always likely to be high. After the time and effort put into a rigorous process, unsuccessful applicants did not regard the quality of the feedback as adequate. This is an aspect that has been identified in previous process evaluations for different funding programmes<sup>17</sup>.
- 2.30 Views on the feedback process from Project representatives highlighted the concerns about different assessors scoring different sections of bids: *'Some of the feedback given on areas of improvement were covered in other areas of the business case. Therefore. it was felt each section was marked/read in isolation without knowledge or reference to the other sections for clarification'*. For others, feedback *'...on the strongest section, as well, would have been encouraging'*. The quality of feedback in grant processes has been an issue that funders should take account of based on research with charities across the UK<sup>18</sup>. The Projects' view on the HAF was that better resourcing of this aspect was needed, and from their perspective this would have helped to achieve a better relationship.
- 2.31 The biggest issue in the timeline for successful Projects was the implications of the delay in notifying Projects of the final decision, and this had unintended knock on effects including:
- Requests for Projects to submit revised budgets;
  - Delays in Projects being able to recruit staff; and some existing skilled employees on fixed term contracts had to take employment elsewhere;

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<sup>17</sup> UKRCS, (2016)

<sup>18</sup> Saxton and Lindström, (2012 and 2018)

- Operational delays due to lack of funding to organise training and book the activity providers required before beginning delivery to beneficiaries; and,
- Planned activities affected by having an autumn start (due to seasonal changes in weather and growing seasons).

2.32 Conversely, some Projects found a positive in the delay in that it allowed more discussion time and background work before delivery, including the important stage of relationship building with intended beneficiaries.

### **The collaborative approach and ways of working**

2.33 The ‘five ways of working’ set out in the Well-being of Future Generations (Wales) Act 2015 were very explicit in the design and delivery of the HAF at both Programme and Project levels. Interviewees confirmed it was a ‘natural fit’. The HAF is a good example of taking the principles of the Act into a grant process and helping to create a context in the Welsh Government in which, for example, collaboration could more easily flourish. However, the relationship of the HAF to each of the ways of working was variable.

2.34 There was strong evidence of collaboration, and some of integration (for example in relation to budget sharing), and the notion of ‘prevention’ was closely associated with the inherent logic of the HAF and the Projects in seeking to alter behaviours to favour improved physical and mental health.

2.35 The original three year funding was considered by many to be too short to see the kinds of impacts desired by Projects on their beneficiaries and on working practices. This put a premium on applying learning from the Projects to mainstream policies and programmes. Despite the emphasis on sustainability within the application materials and guidance, it was unclear how this might occur. This issue is considered in more detail in Chapter 5.

2.36 ‘Involvement’ was more apparent at Project level than at Programme level. Projects were required to evidence engagement with the local community. From a Project perspective the same emphasis was not evident at Programme level in terms of engagement with prospective applicants on issues such as timelines and monitoring and evaluation requirements.

- 2.37 A key requirement in the design of HAF was to ensure that collaboration was built into Projects: *'All Projects will need to involve a range of partners in their design and delivery but there must be a minimum of two organisations from different sectors and the lead body must be from the Third or Public sector.'*<sup>19</sup>.
- 2.38 The collaboration aspect was also built into the support arrangements for applicants. The HAF team members who we interviewed made it clear that they wanted to create networking opportunities for potential applicants from the outset, with roadshows designed accordingly:
- 'These events provided an opportunity for potential applicants to network with other interested parties – and this was a theme that we wanted to pursue throughout the whole process. It was designed to avoid duplication of project applications, to bring people together and to share resources/ideas – align with Well-being of Future Generations'*. (HAF team member)
- 'Collaboration was the primary driver and at the forefront of everything. A condition of funding'*. (HAF Team member)
- 2.39 The administrative process required evidence of collaboration from applicants. Partnership arrangements had to be set out in applications at EoI and Stage 2. Formal signed partnership agreements had to be submitted by successful Projects prior to release of funding. Over 150 partners are referenced in the application documents, and feedback from Projects suggested that many were 'new', with lead applicants working with organisations previously unknown to them.
- 2.40 At the Programme level, the collaboration between the three partner organisations involved jointly designing, leading and operating the HAF, and pooling budgets. The process helped to establish a positive relationship between them, and clear roles and responsibilities and a structure for reporting and decision making. As one Programme representative commented early in the HAF: *'It hasn't felt like we're three different organisations – we all want it to be a success and buy into it'*.

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<sup>19</sup> Healthy & Active Fund Call for Applications and Fund Guidance, October 2018

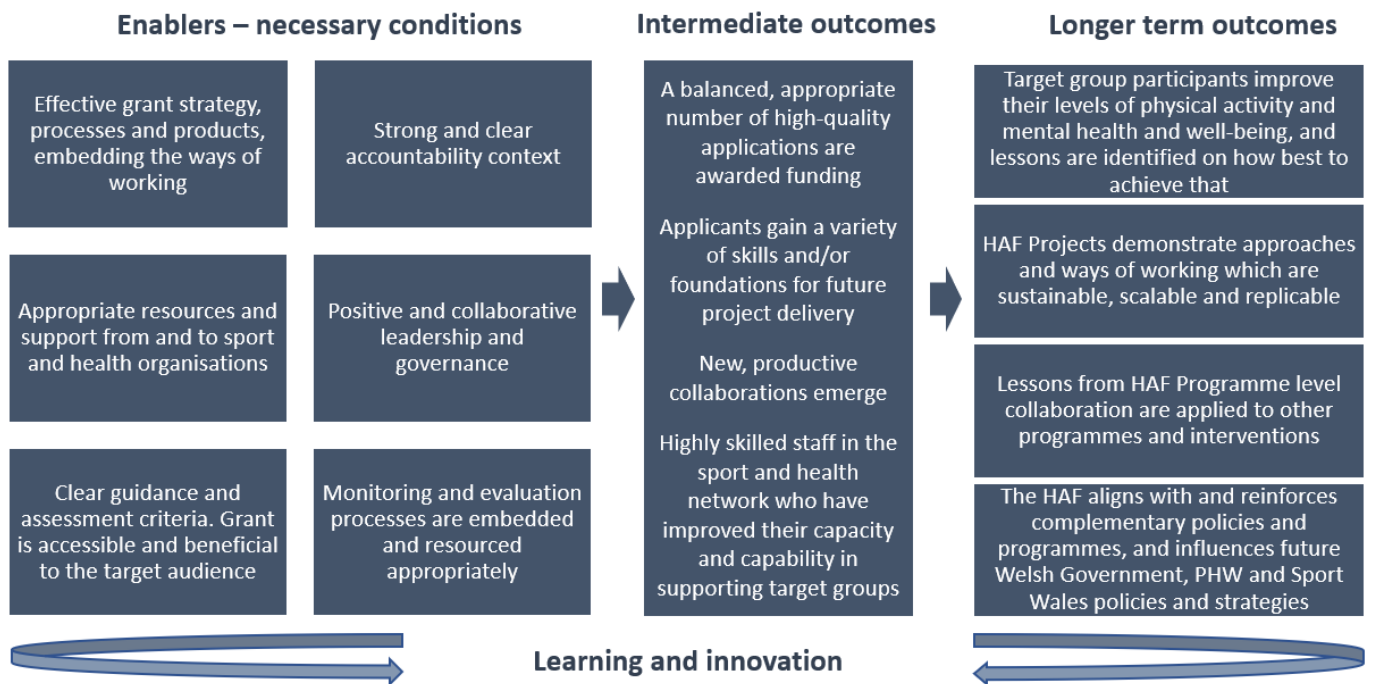
- 2.41 At Project level, the collaboration between the two parts of Welsh Government, Sport Wales and Public Health Wales in developing and leading the HAF was viewed positively. Projects were particularly encouraged by the explicit link between sport and health with the HAF proactively bringing the two together in a way that could support delivery 'on the ground'. Projects spoke of a desire to work more closely with 'health' and felt they had a lot to contribute in terms of prevention.
- 2.42 Projects recognised the importance of collaboration and the potential benefits in the longer term. However, they also highlighted the tension in the application process in encouraging collaboration within a competitive grants process. This was at odds with applicants being prepared to share their ideas, and risk their plans being deployed elsewhere and thus losing out.
- 2.43 Projects also suggested that there were other opportunities to embed collaboration within the process, namely in the development of the monitoring and evaluation requirements. One Project felt that the system they already deployed locally might have been used by other Projects if there had been the right opportunities to explore that possibility.
- 2.44 Reflecting back on the HAF from 2023, Programme level interviewees raised the collaborative process and joint working arrangements between the three partners as a highly positive outcome. It has provided some strong foundations for future partnership working between departments and organisations at different levels of seniority. Programme representatives from senior level to Case Officers referenced the benefits of building new and stronger working relationships across the partner organisations. For Case Officers, this extended to their work with Project organisations, raising awareness of new types of intervention and increased knowledge and insight to help their day to day work.
- 2.45 This was also the case for Project representatives who forged new partnership arrangements and connections through HAF, extending their own networks. This did not happen to the same extent *between* Projects however – something that Project interviewees referenced as a missed opportunity to share insight, learn from and support each other.

## Learning points

### *Model for a successful Programme process*

- 2.46 During the early phases of the HAF, our analysis highlighted some wider implications and themes for an effective process for a grant programme. An effective grant process should create the conditions to enable the necessary intermediate outcomes to be achieved which will, in turn, facilitate the ultimate longer term outcomes aspired to by the programme. We took a simple logic model and combined it with a model for business excellence<sup>20</sup> (Figure 2.2, see also Figure 3.1). We used this to inform the review of the documentation and the content of interviews. This helped to identify the aspects of the HAF process which were, and are, potentially relevant to other grant programmes.

**Figure 2.2 Model for an effective HAF process**



- 2.47 Our findings in relation to each of the six key enabling conditions were as follows:

<sup>20</sup> See the [EFQM model](#). We are using here an earlier version of the EFQM model which was updated in 2020.



- a) Accountability: The HAF operated within established Welsh Government processes and procedures, and there were clear lines of ultimate accountability through the individual Departmental and organisational hierarchies, and Ministerial decision making. This accountability was strongly and properly felt and enabled the design of the HAF to give effect to multiple Manifesto commitments and Ministerial concerns.
- b) Leadership and Governance: The HAF deployed relatively standard arrangements for leadership and governance, with Joint Senior Responsible Owners (SRO) and a combined Project Board and designated sub-groups. These worked well and enabled different initial perspectives between key actors to be worked through and resolved on the issue of how best to achieve improvements in the physical and mental health of key target groups. As the HAF reached a new stage, we suggested that a new forward agenda could be developed where HAF governance and leadership arrangements could be adjusted, and this is explored further in Chapter 3.
- c) Strategy, Process, and Product: The key actors approached the development of the HAF process in a thoughtful way, and explicitly attempted to shape the Programme so that it best gave effect to its main aspirations. The documentary and interview evidence, and the outcomes in terms of the quality of the Projects selected for funding, show that this was done to a good standard. There were particular successes in relation to strategy and product in combining the two manifesto commitments and fully sharing Departmental and Arm's-Length Bodies' budgets.
- d) Resources and Support: Programme development and implementation is always demanding and uneven in terms of staff resources required over time, and the HAF was no exception. It was fortunate that the HAF was able to make extensive use of a senior officer from Welsh Government's Culture and Sport Division who had been seconded to Sport Wales. He brought unique and deeply experienced perspectives and was able to play an important bridging role. Moreover, all four partners contributed staff time and effort, and worked together in a collegiate and collaborative way. It may be that there should be a programme budget 'top slice' to enable the necessary resources to be available

to meet the inevitable peaks, especially in the absence of the fortuitous circumstances from which the HAF benefited. However, we do not underestimate the corresponding overhead of drafting in extra staff resources on a short term basis.

- e) Guidance and Assessment: Our documentary review and interviews indicate that for the most part the guidance issued was relevant, sound and timely, and that the assessment criteria were appropriate and fairly applied, although some Projects found them quite demanding.
- f) Monitoring and Evaluation: This was an area of some difficulty that arose throughout the evaluation. One approach that might create a more integrated and connected approach to monitoring and evaluation at Programme and Project level would be the early development of a comprehensive Monitoring, Evaluation, Accountability and Learning plan ('MEAL') which is increasingly being adopted by grant programmes, especially in the area of international development<sup>21</sup>.

2.48 Throughout the process, the HAF team reflected on how well the process was working and how it could be adapted both to 'internal' suggestions as well as the feedback of prospective applicants. A number of suggestions for improvements to the detailed administrative process emerged from the evidence we collected. They include:

- Practical improvements, such as better use of smart reporting in the application forms, especially at EoI stage, to avoid applications for partly ineligible Projects that leave applicants disappointed and taking up valuable staff resources (internally and externally);
- Planning realistic timeframes for the whole process, taking account of time requirements for signing off decisions at senior level across different organisations;
- Joint budget allocations debated and confirmed at the outset to avoid a negative domino effect on resourcing at local project level;

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<sup>21</sup> See for example the EvalCommunity at [MEAL Framework](#)

- Appropriate resourcing for the staff designing and administering a new grant; and,
- Considering how the ways of working adopted successfully to application stage could have continued to be embedded in years 2 to 3, such as through Case Officer support and provision of further collaborative opportunities to bring the 17 Projects together.

- 2.49 One key overall lesson is the importance of striking a balance between the demands of the HAF process on applicants and the resulting benefits in terms of better Project and Programme outcomes. There is no perfect point of 'balance' but in the case of the HAF it was problematic that the fact that twice as many applicants than could be funded completed the demanding final stage, with no explicit process for transferring these efforts into alternative productive possibilities. This is a point of learning for future programmes. Other grant funds in Wales have had similar challenges with the numbers of good applications far outstripping the available funding.
- 2.50 It is important to recognise that the successful design of the HAF was the result of the governance and leadership provided through the HAF Project Board and Team, as much as to specific design features. The shared leadership across the Welsh Government policy teams, and the integrated approach between all four major partners, enabled the design to draw on a wide range of experience, and for ideas to be tested and challenged in a positive and constructive way, notwithstanding any differences of perspective and approach.
- 2.51 The leadership and governance were fit for purpose in the sense of delivering the Board's key responsibility to create a viable Programme within a tight timescale, with a good range of quality Projects, and appropriate and integrated funding which had been drawn from multiple sources. Perhaps the most obvious impact of that has been that without HAF funding several Projects reported that they would have continued their work on only a smaller scale. Some would have continued to seek funding opportunities elsewhere to take their ideas forward, but in isolation or possibly only with some existing partners rather than having the strong collaborative focus that emerged.

2.52 The Board's role inevitably changed once Projects were underway. The evaluation process and work on its Theory of Change (Chapter 3) provided an opportunity for it to consider its role going forward, and in what way, if any, its leadership and governance functions should be revised.

### 3. The HAF Theory of Change

3.1 Our [report on the HAF theory of change](#) was the first major output of the evaluation<sup>22</sup>. It identified some important and interesting aspects of the HAF which go beyond the Programme itself and which have potential implications for the ways in which Welsh Government and its partners might seek to deliver future programmes and mainstream activities. In this Chapter we summarise the Theory of Change and draw out the lessons learned.

#### The HAF Theory of Change

3.2 Part of the evaluation was to:

- Develop a theory of change for the HAF to illustrate how the activities are intended to achieve an increase in physical activity and improvements in mental wellbeing; and,
- Use it to refine the evaluation questions and objectives.

3.3 The Center for the Theory of Change<sup>23</sup> describes the approach as a rigorous process to identify the conditions which have to be met for long-term outcomes to be achieved. These conditions are arranged graphically in a causal framework. It requires clarity on long-term goals, measurable indicators of success, and explicit actions to achieve goals plus the articulation of underlying assumptions and makes connections between what is done and what is hoped to achieve. The theory of change is the summary statement of the logic model sequence. In the Welsh Government, those developing new policy interventions are encouraged to think about their theory of change.

3.4 The evidence showed that there was an operating theory of change, albeit that it was not explicit nor articulated as such at the time. The Welsh Government's commitments spanned both health and sport and physical activity. What was required was a visible initiative which could give effect to them and was consistent with the likely available scale of resources. This led to the idea of a fund to be

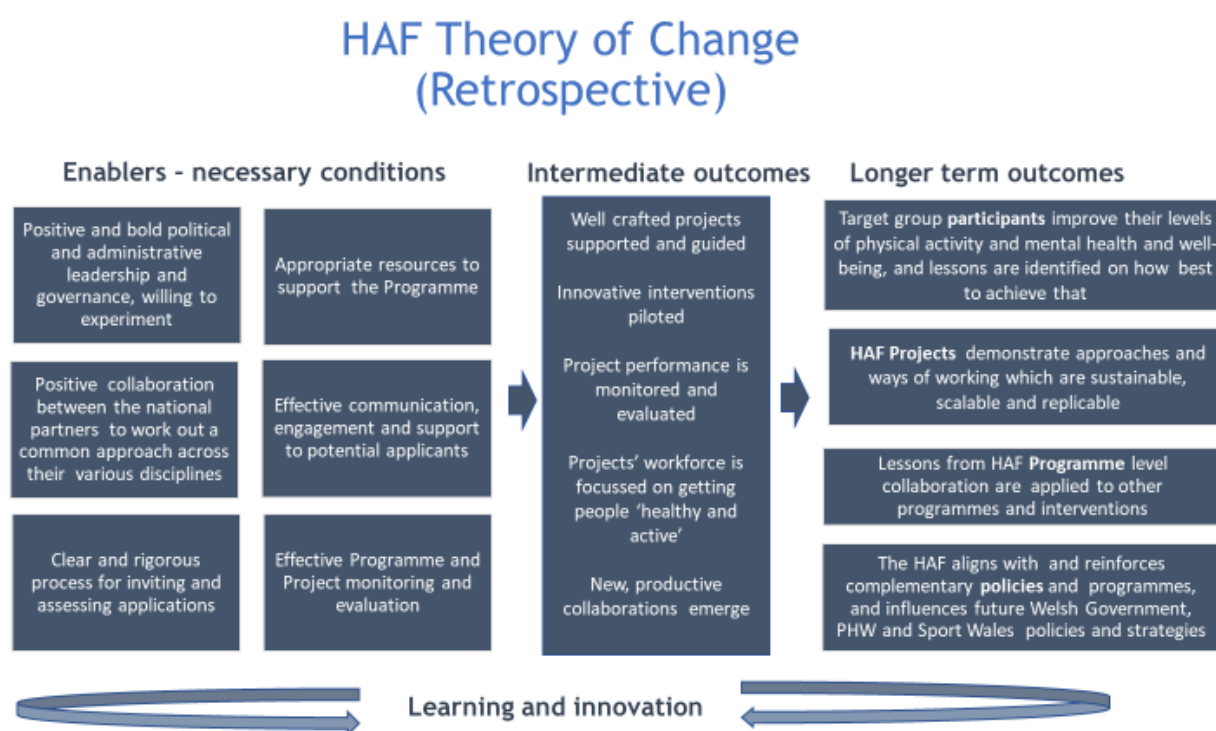
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<sup>22</sup> UKRCS (2021a)

<sup>23</sup> [A not-for-profit institute](#) aiming to support high standards in work involving theory of change, accessed 13/02/24

made available to bidders for projects but still left quite a lot to be worked out, and that was entrusted to a Project Board of the key actors. It was recognised that a Programme of the scale envisaged would not in itself create significant population level behaviour change. However, it could be capable of demonstrating new approaches and ways of working, and generating learning which could inform future programmes and policies, as well as mainstream budgets and approaches. In diagrammatic form, and from a retrospective vantage point, the implicit and underlying logic model and theory of change had the broad form as set out below:

**Figure 3.1: Retrospective Theory of Change**



3.5 As seen above, the theory of change did not follow a strict uni-causal logic. Rather, it identified a series of enablers to create an environment which could lead to a series of intermediate outcomes and then go on to contribute to longer term and wider objectives. Most of the enablers were explicitly identified by the Project Team which put the HAF together. Others, including the leadership aspects, were evident in the interviews and documentary reviews, and we drew it out from that evidence. The intermediate outcomes consisted of the principal components of the HAF Programme as developed through those enablers.

3.6 In order to explore the HAF theory of change in a more granular way, we focussed on three ‘subsidiary’ theories of change to this overall one as follows:

- A **substantive** theory of change which focuses on the Programme’s declared aims and links them to the objectives aspired to by the Projects;
- A **process** theory of change which describes how the design of the Programme itself and its consciously organised stages are intended to result in better programme-level outcomes; and,
- A **‘ways of working’** theory of change which places collaboration centre stage as a means to ensure better outcomes for both Programme and Projects.

*The HAF Substantive Theory of Change*

3.7 This theory of change starts with the Programme’s declared aims. From that and Programme documentation we derived a substantive theory of change statement:

By funding specific projects over a three year period led by public and voluntary bodies it is possible to increase physical activity and improve mental wellbeing...  
...especially by focussing on target groups facing significant barriers and by developing community and workplace social assets and resilience...  
...and by encouraging lead bodies to work with partners in a structured and positive way...  
...to provide innovative practical examples and evidence of which approaches worked best and might be replicated and/or scaled up.

3.8 These themes were evident in the HAF documentation, and several respondents articulated them. There were some differences, closely related to differences in agency mandates and strongly associated working methods and cultures. But they were reconciled within the framework of understanding amongst all the key actors about what the HAF was trying to achieve. There was strong common ground about the potential to generate lessons and insight that might be applied elsewhere.

3.9 Whereas at Programme level the theory of change was implicit, the Projects were required to be explicit about their theories of change both in the call for applications, and in the Business Case template. Project evaluation guidance also keyed applicants directly into a logic model approach. The theories of change adopted by

the Projects gave effect to the underlying theory of change of the HAF Programme overall. The assessment criteria and process created the linkage and gave the Project Board comfort that the Projects funded would help give the desired effect to the HAF programme aims<sup>24</sup>.

#### *The HAF Design Process Theory of Change*

- 3.10 A second theory of change was implicitly embedded – and strongly so – in the process by which the HAF was developed and delivered. Each stage of the HAF design process was explicitly designed to contribute to the goal of having a set of Projects which were well designed and focussed on the HAF target population, satisfied the requirements of scale and duration in the Programme design, provided a good spread of Projects and Partners, and were geared to being evaluated.
- 3.11 The stages and the design aspects concerned included:
- a systematic communications strategy;
  - an ‘Expression of Interest’ stage to act as a point of entry and a filter;
  - a demanding full application process; and,
  - explicit monitoring and evaluation.
- 3.12 The HAF ‘design process’ theory of change was in many ways the clearest and strongest of the three, and the one most consistently expressed across the documentation and by key actors.
- 3.13 The ultimate intended outcomes of the HAF were supported by all of these activities and outputs and initial outcomes. They resulted in a well-balanced group of Projects displaying innovation and partnership and with fair prospects of having an impact on the health and activity levels of their target populations, and capable of generating valuable lessons for potential wider application.

#### *The HAF ‘Ways of Working’ Theory of Change*

- 3.14 Those leading development of the HAF consciously related it to the Well-being of Future Generations (Wales) Act 2015. The Programme engaged with the national

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<sup>24</sup> HAF Call for Applications and Fund Guidance, October 2018.



Well-being Goals of a healthier and more equal Wales, and of more cohesive communities, and the HAF team emphasised strongly the notion that the HAF should be a sustainable intervention. They also saw an explicit connection with the Act's 'ways of working', especially in terms of prevention and working for long term and sustainable change<sup>25</sup>.

- 3.15 The theme of collaboration was consistently articulated, and consistently seen by key actors as important not just in itself but because of what collaboration could help to achieve, and at both Programme and Project level. It therefore warranted to be seen as a distinct HAF 'ways of working' theory of change. At Programme level collaboration was very visible and powerful between the national partners. At Project level, applicants were actively encouraged to partner with others to strengthen reach, resilience, and impact.
- 3.16 At Programme level the HAF involved joint working between two Government Departments, (Health and Social Services, and Culture and Sport), and two delivery agencies (Public Health Wales and Sport Wales), with the latter also an arm's length body. It involved jointly designing, leading and operating the HAF, and the pooling of budgets between some of the partners. It was also seen as genuine collaboration between the partners rather than as continuing the 'principal-agent' quality of some interactions where Government consults but then decides itself.
- 3.17 Collaboration in the HAF was exceptional, if not unique. One aspect was the issue of sharing of budgets, seen as good for cross-government working and budget pooling but 'very rare in relation to budgets'. One key Programme actor saw the positive collaboration as something of an entry point to longer term budget possibilities. The Programme had been '*a refreshing and exceptional collegiate approach to the whole process. The HAF was driven by manifesto commitments, and these are inevitably short-term. We can now move from a positive approach based on this collaboration and stimulus and turn it into core future budget discussions.*' From this perspective, to shift working practices to support the five

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<sup>25</sup> The other most relevant 'ways of working' here would be integration and involvement. Generally, see the ['Essentials'](#) guide to the Well-being of Future Generations (Wales) Act 2015.

ways of working more strongly would require changes in overall budgeting practices as well as a significant cultural shift.

- 3.18 However, collaboration is not a quick fix because *'it runs counter to the way in which government activity is usually organised and therefore requires high level political commitment backed by significant managerial capacity'*<sup>26</sup> and the transaction and set-up costs of collaborations can be high and may risk disruption of existing delivery chains, whilst repeated and poorly planned initiatives may even produce 'collaboration fatigue' and damage the impulse.

#### *The Prospective HAF Theory of Change*

- 3.19 The HAF was a strong example of getting a grant-funding programme up and running, which our evidence suggests owed a great deal to the collaborative approach, the thoroughness of the process and the professionalism with which it was conducted. The results in terms of the number of Project applications and the quality of applications approved was impressive. We have discussed above the initial overall HAF theory of change, and its three subsidiary theories, and the part they played in implementing the HAF. We were also asked to explore what a HAF theory of change might look like going forward into the delivery phase, and draw out possible implications for the longer term Programme evaluation.
- 3.20 There is considerable value in programmes such as the HAF articulating their theory (or theories) of change. The theory of change and associated logic model provide a basis for subsequent evaluation. It also helps provide clarity about objectives between key actors from the outset. This is especially so when a programme aims to address complex social issues, such as supporting people who do very little exercise to become 'healthy and active' on a sustained basis. How to use a theory of change approach in the context of complexity is one of the challenges of this method.
- 3.21 For example, greater physical activity and greater participation in sport both have a positive effect on obesity. However, it is less clear how they figure in the causal 'chain' which helps create it. The broad causes of obesity are grouped around both

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<sup>26</sup> Connell, Quarmby, and Martin (2019)

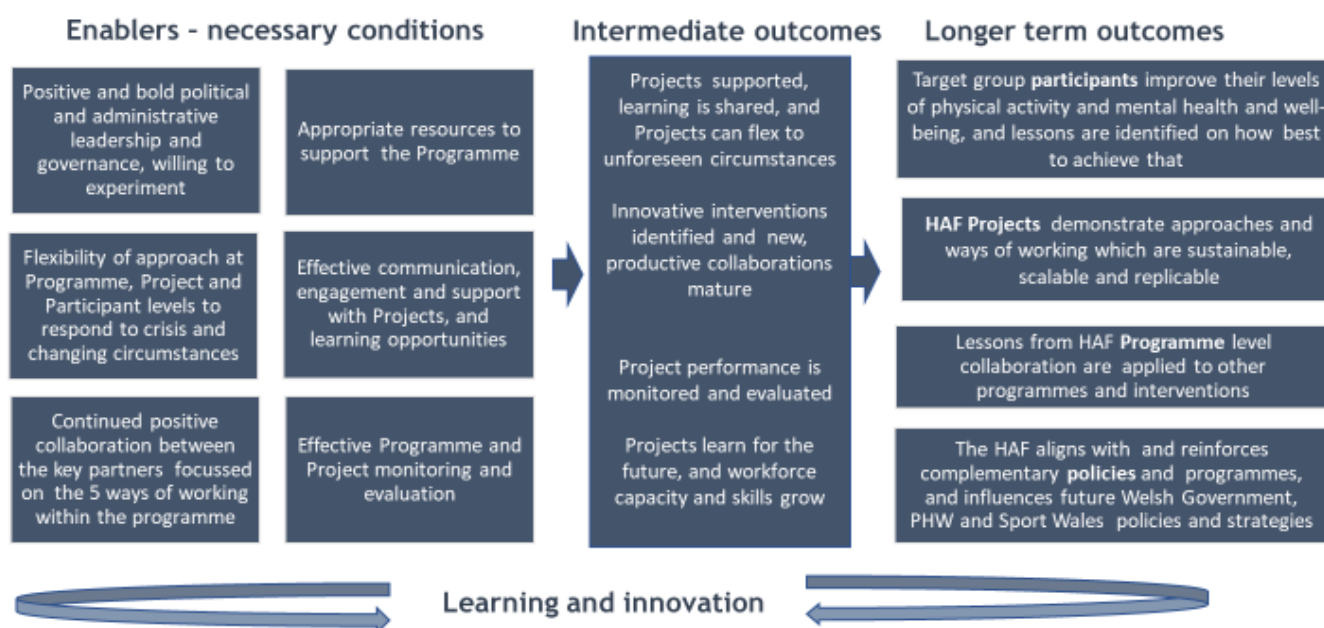
social influences and nutrition as well as a lack of sport participation and general physical activity<sup>27</sup>. In relation to the HAF there was not common ground between the partners about how relevant it was to issues of obesity – for some it was, and for others not. Drawing out the HAF theory of change could have helped clarify that, and informed where best to focus evaluation and learning.

### A Forward Theory of Change

3.22 A forward theory of change for the HAF was best situated once the Programme was operational, with Projects underway and with the huge initial effort of getting the Programme designed and up and running well behind the key actors. A draft forward theory of change was prepared and then tested at a workshop with members of the HAF Project Board and its subgroups. The theory of change which emerged from those discussions was as below:

Figure 3.2: HAF Theory of Change going forwards

## HAF Theory of Change Going Forward During the Programme



<sup>27</sup> Welsh Government (2019)

3.23 There are some familiar ‘enablers’ in this logic model and theory of change from the earlier one. Political and administrative leadership remain important, along with continued collaboration between the national partners and ongoing communication and support to the Projects. On the other hand, ‘flexibility’ emerged as a new enabler, which reflected its importance during the pandemic in responding to unforeseeable challenges. The intermediate outcomes are concerned with delivery at Project level and how the Programme can facilitate that, and about the results of effective Project delivery – identifying innovative approaches, gains in workforce capacity and skills, and results from Project level monitoring and evaluation. The longer term outcomes aspired to then include the wider application of successful ways of working, learning lessons, and direct benefits for beneficiaries and their communities.

3.24 There was a good degree of consensus around this model and theory of change amongst the HAF Programme level actors. However, they also recognised that this one theory of change model could give rise to quite different approaches by the Project Board, principally related to the resources available and the Project Board’s preferred way of working. One scenario might involve relatively low input of staff and time resources, and relatively low Programme level activities whilst another scenario might involve relatively high input of staff and time resources and relatively high Programme level activities. The two scenarios would lead to different levels of activity on the part of the HAF Project Board in terms of frequency of meeting, whether to designate a Programme Manager or Director, the role of Case Officers, and so on. The differences in resource inputs would affect the amount and character of the ‘added value’ from the Programme level. This could include:

- The extent of proactive versus responsive approaches employed e.g., in terms of guidance and support;
- The degree and character of support available e.g., to support Project evaluations;
- The ability to take a systematic and strategic approach to learning;
- The ability to inform the Welsh Government policy and grants community with lessons at both Project and Programme level; and,

- Potentially, the operational effectiveness of Projects, and the benefits to participants.

- 3.25 Once a choice had been made as to where the HAF Project Board wanted to be on the continuum, it would underpin a forward HAF theory of change along the following lines: *The HAF Theory of Change for the remainder of the Programme is to provide leadership, resources and other enabling conditions so that Projects will be supported and monitored effectively, and lessons will be actively learned. This in turn will enable the HAF Programme to inform future health and physical activity grant programmes in terms of their form, process, and content. It will also influence mainstream policies and programmes, including those aimed at improving physical activity, mental and social wellbeing, and reducing health inequality.*
- 3.26 It was anticipated the forward HAF theory of change would inform issues such as the role of active learning and sharing between Projects, between Projects and Programme, and also between the Programme and the relevant wider policy frameworks such as the agendas for tackling obesity and longer term prevention. It would also help frame thematic areas to explore through the Programme level evaluation, and identify possible revisions to the questions which need to be asked during the remainder of the evaluation.

### **Implications for the HAF Evaluation**

- 3.27 The theory of change informed the original evaluation questions and objectives, and especially the part played by each of the 'enablers' in the HAF forward logic model and theory of change. It also informed how supporting Projects through this type of funding mechanism was intended to make a difference to physical activity and mental wellbeing in targeted groups, and also how the HAF was intended to instil the 'five ways of working' across the Projects and at Programme level.
- 3.28 In addition, it has potential learning about the value of using theory of change and logic model approaches to Programme and Project design, something which is increasingly being used by all three partners and about which reflection would be valuable. At present the internal Welsh Government policy guidance asks people to think about what their theory of change is. It also provides a Logic Model Template

and points to a link for further guidance<sup>28</sup>. There is not currently any theory of change guidance as such as to whether a grants programme approach would be the right or best way for this kind of intervention.

### **Learning**

3.29 The HAF Theory of Change generated a number of insights and lessons, including:

- The right combination of people, with clarity of purpose, in designing a programme such as the HAF may not need an explicit theory of change in order to succeed in creating an effective outcome in the form of a working and credible intervention, although having a Theory of Change will almost certainly strengthen the clarity and discipline of the approach taken;
- The imperative of Ministerial priorities provided a strong impetus within a new partnership to collaborate to powerful effect, and break new ground, for example in budget sharing across Welsh Government and even with external partners, albeit all with Welsh Government funds;
- There was a clear underlying ‘logic model’ and theory of change, and the components of that provided the key enablers which underpinned the successful design and launch of the HAF. While not stated as such, this provided the project discipline and clarity of purpose which enabled the project team to pool their varied capabilities and resources, agree key issues, and resolve such differences as there were;
- A theory of change for a HAF-type programme need not be uni-causal and rigid, and indeed was not in this case. It is also capable of change and adaptation as circumstances change, and a point of reference from which variation and new directions can emerge from a confident base of thought and planning;
- It can help to identify what the most important factors have been in successful programme design and implementation – in this case highlighting the critical role of collaboration;

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<sup>28</sup> Public Health England (2018).

- An explicit theory of change in a HAF-type programme, with multiple Projects funded on an application-response basis, can provide a clear and relatively simple test of alignment between the logic of intervention at project and programme level; and,
- A theory of change approach can also help to open up a variety of options in terms of programme management and leadership, as reflected in the two scenarios which flowed from the prospective Theory of Change. The choice of scenario even within the same theory of change can have significant implications for whether key Programme objectives are achieved.

## **4. Delivery under Covid**

4.1 This Chapter analyses the delivery phase of the HAF, covering in broadly chronological order the period of delivery post-award, throughout the Covid-19 pandemic and beyond. The bulk of the HAF was delivered under Covid-19 conditions, starting in early 2020 and extending into late 2022/early 2023 and this had a profound effect on the Projects. We set out the reporting, monitoring and evaluation requirement for Projects and the support provided at Programme level. We then look at how the Covid-19 timeline unfolded and its implications for HAF delivery, and the challenges, adaptations and innovations made - both in response to the pandemic and from ongoing learning throughout the main delivery process.

### **Getting underway**

4.2 The period following the application process through to beginning actual Project delivery took some months. Although the Project Board had made the final decision to award funding to 17 Projects in March 2019, ministerial sign-off was not achieved until June 2019 and the first grant payment was made in August 2019, six months on from Projects submitting their applications. As referenced in Chapter 2, this had some knock-on effects on the timing of some delivery plans (for example, because of growing seasons and seasonal weather implications), and also planning and partnership building with sectors such as schools. Where Projects intended to recruit staff with part of their grant, they had to delay until they had the necessary funding to start the process.

### *Project reporting requirements*

4.3 Project reporting and data requirements were set out in detail in each Project's Grant Offer Letters. Projects were required to submit two Highlight Reports each year, in February and December, and an Annual Progress Report. Templates were provided which asked Projects to report against the same areas as were included in the application Business Case, i.e. Strategic, Economic, Commercial, Management and Financial. For Highlight Reports, these areas were to be written up in relation to (i) Good Practice (ii) Key Delivery Milestones Achieved (iii) Major issues and (iv) Risks. Under each of these sections, Case Officers provided commentary. For the



Annual Progress Report, these five business case areas were reported against under the headings (i) Successes (ii) Challenges. Projects were also asked to include an Executive Summary, report against their milestones, outputs and outcomes, include a section on Risks, on Project Level Process and Outcome Evaluation, Reflections and Learning, and Finance.

#### *Monitoring and evaluation requirements*

- 4.4 Projects were provided with an Evaluation Toolkit in January 2019. This set out general advice on undertaking process and outcome evaluation, developing a logic model and the minimum requirements for collecting quantitative data:

*‘Depending on the type of your project, there will be a minimum requirement to monitor your project’s participants’ physical activity and/or mental wellbeing levels and submit these responses back to Welsh Government on a periodic basis. This requirement does not prevent you from using additional measurement tools for physical activity or mental well-being if you wish’.*

Further details on the specified tools and the process for submitting data are set out in Chapter 6.

#### *Post-award support*

- 4.5 Following the application and award process, the Project Board proposed the allocation of a Case Officer for each Project, based on an approach previously adopted by Sport Wales for the Calls4Action Programme. As stated in the grant offer letter:

*‘Each project will be allocated a Case Officer, who will be the first point of contact for all queries from the project lead and the liaison between the HAF partnership and the project. The Case Officer will be responsible for receiving the monitoring data and information required under the terms and conditions of this Offer and will contact the project lead during the implementation phase to agree a timetable for submitting all information and a bespoke template for project data’<sup>29</sup>.*

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<sup>29</sup> Document ‘Healthy & Active Fund - Grant Offer Letter – FINAL TEMPLATE’

The role of the Case Officer was intended to be ‘light touch’. Case Officers were drawn from each of the three partner organisations and training and support was organised to help them become familiar with the HAF and with the Monitoring and Evaluation Toolkit and requirements that had been issued to Projects. A Case Officer role description<sup>30</sup> was set out in the Programme’s Terms of Reference and Governance documentation, and the HAF Delivery Group provided Case Officers with a Handbook that included project specific information and general guidance.

- 4.6 RCS team members were assigned specific Projects for the Programme evaluation and reviewed Project-specific documentation, made contact with Project staff and undertook initial interviews in August and September 2019.

## **Covid-19 – Impact and innovation**

### *The Covid timeline*

- 4.7 Project delivery was at the early stages when Covid-19 began to emerge in the UK. On the 23<sup>rd</sup> March 2020, Covid-19 restrictions began across the UK and triggered an abrupt halt to Projects’ delivery plans<sup>31</sup>.
- 4.8 Some Project partners were furloughed, others shifted to online working. Some Project staff and partner organisations diverted resources from their planned work programmes to provide an emergency response (food, medicine deliveries etc.) which helped make HAF Project staff visible and familiar in the communities they wanted to engage with, and offered a chance for informal consultation.
- 4.9 Communication from Programme level was less frequent at this stage and there were gaps in contact from Programme to Project level. From 11<sup>th</sup> July 2020, a number of businesses and services could re-open, although not in the sport and leisure sector. From 20<sup>th</sup> July, outdoor spaces that included outdoor gyms and playgrounds were opened. It was later that the First Minister for Wales confirmed that swimming pools, indoor fitness studios, gyms and leisure centres could reopen from 10<sup>th</sup> August, along with children’s indoor play areas<sup>32</sup>. These were facilities

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<sup>30</sup> Document ‘Healthy & Active Fund \_ Governance Arrangements June 2019 - final version’

<sup>31</sup> Storms Ciara and Dennis, both of February 2020, had already caused disruption to some Projects, particularly those focussed on outdoor activities.

<sup>32</sup> See the Senedd Research announcement at: [Coronavirus timeline Welsh and UK governments response](#)

that some Projects would have been using in 'normal' circumstances. Projects that had a focus on the outdoors in whole or in part were benefited when many other activities were unavailable to the public.

- 4.10 However, options for face to face delivery did not last long. In September 2020, a significant rise in coronavirus cases began in Caerphilly and local restrictions were applied to the local authority, followed by further restrictions for RCT, Blaenau Gwent, Bridgend, Merthyr Tydfil and Newport. By the end of the month this also included Cardiff and Swansea, Neath Port Talbot, Torfaen and the Vale of Glamorgan, and from October, Denbighshire, Flintshire, Conwy and Wrexham, with a cluster in Bangor. With most of Wales now under restrictions and the situation not improving, a firebreak lockdown took place in Wales from 23<sup>rd</sup> October 2020 to 8<sup>th</sup> November 2020.
- 4.11 Programme actors were keen to facilitate opportunities to encourage learning and sharing, and remote working allowed some sharing between Projects, and between Programme and Project level. In October 2020, an online learning event was organised by the Programme to explore the adapted delivery approaches that had taken place during the pandemic and to discuss the lessons learnt. Learning from Covid-19 implications became a key theme throughout the remainder of the Programme evaluation.
- 4.12 Restrictions remained in place until mid-March 2021 when 'stay local' restrictions were eased and outdoor facilities could reopen. From 7<sup>th</sup> June 2021, groups of 30 could once again meet outdoors. In August 2021, the First Minister announced that Wales would move to the new alert level zero on 7<sup>th</sup> August 2021, with no legal limits on the number of people who could meet, including indoors, and all businesses would be able to open. However, as the new Omicron variant emerged, alert levels and guidance around masks, testing and self-isolation requirements continually fluctuated until late May 2022.

### *Challenges*

- 4.13 All Projects had to change their delivery approach. The extent and duration of the changes varied between Projects because of the diversity of partners, providers,

activity types, locations and target audiences. One Project - the Five Ways to Wellbeing Project led by Betsi Cadwaladr University Health Board - was subject to a mandatory pause at the outbreak of the pandemic so that resources could be redeployed to deal with the pandemic. The Project was unable to provide reassurance that it could commence in January 2021, and could meet agreed targets. Therefore, with regret, the HAF Partnership withdrew the offer to provide future funding for the Project.

- 4.14 Disrupted partnership arrangements: Projects who were working in the health sector or had planned to develop partnerships with health professionals were clearly adversely affected, as were those who planned to work with schools.
- 4.15 Access to beneficiaries: Direct consultation and promotion of Projects was not always possible in the view of the Projects. This led to a need to engage with communities via trusted partners and organisations who had direct contact with and understanding of their user groups. We cover the theme of community engagement further in Chapter 5.
- 4.16 Managing risk and organisational processes: As restrictions lifted and indoor and group activity returned, Projects experienced some organisational risk aversion to group delivery and some venues were not suitable because their size and layouts were not able to comply with social distancing measures. There were some additional costs due to additional cleaning and requirements. Projects needed to ensure that safe provision was in place, with the associated additional risk assessment that entailed. There were examples of Projects that had planned to use school buildings having to find alternative venues and approaches. Some schools limited access to pupils and their own workforce and access for external groups was paused. Where Projects worked across local authorities, they encountered variations in the management of local restrictions and frequent changes to the rules. It also became difficult to recruit and engage with new volunteers during this period, especially where Projects had planned to provide volunteers with in-person training.
- 4.17 Changing beneficiary needs: Projects recognised that the needs of beneficiaries had also changed as a result of the pandemic. For some, confidence levels were

low and there was anxiety about returning to face to face or site-based participation, especially among older participants and those who were vulnerable to Covid-19 because of existing health conditions. This was particularly true where participants were new to being active and did not have previous experience and 'activity know-how' to access venues and spaces for physical activity.

- 4.18 Projects observed that there was an increased need to focus efforts on supporting people with their mental health and wellbeing, and this aspect of the wider Programme aims became more important. A growing amount of evidence highlighted the disproportionate negative effects of the pandemic on demographic groups that the HAF sought to engage with. In this respect, HAF delivery became part of a wider solution. Projects felt the social connections that had been created became an increasingly important support mechanism for the target audiences. Projects reported that participants highlighted to them the connections with others and social outcomes as key benefits from their involvement in the HAF.
- 4.19 Reporting, monitoring and evaluation: There were some challenges in relation to the monitoring and reporting requirements for Projects. Notwithstanding the issues arising from the pandemic, in practice, the timescale for Highlight reporting did not work particularly well for Projects or Case Officers. Having provided a December Highlight Report, Projects found that they had little additional material and insight for their February Highlight report. There was typically less activity taking place during the holiday period when annual leave was taken, and winter weather sometimes affected delivery.
- 4.20 More difficult for Projects - and exacerbated by the lack of face to face options to meet participants during pandemic restrictions - was collecting data using the standard tools recommended for measuring physical activity and mental wellbeing. As Projects observed, these measures were not always appropriate or validated for their target groups. Those working with young children and / or older adults (Early Years Wales, StreetGames, Eryri Bywiol, Sporting Memories, Action for Elders Trust, Bridgend County Borough Council) found the measures difficult to use. Some Projects, with agreement from the Programme, did not capture quantitative

information using the standard tools to assess physical activity and mental wellbeing levels. Alternative approaches were used.

*Adapted delivery models and enablers*

- 4.21 As a result of the challenges, Projects proved that they could be greatly flexible with their delivery models and made a number of adaptations:
- 4.22 Digital solutions: Many Projects shifted to digital delivery to maintain a level of provision and keep in contact with their target audience and existing beneficiaries and partners. Although now well-established, the original shift to online provision and communication was not straightforward. Systems were not necessarily in place for the workforce to switch instantly to digital options, especially for smaller third sector organisations with fewer resources. Frontline workers and activity providers did not always have access to the software and devices to enable them to work remotely. Staff, as well as target beneficiaries, had to develop new skills and digital literacy to enable this way of working and engaging, and ensuring that it did not exclude the very people they wanted to involve. This was often difficult with greater digital deprivation in the areas and target groups that Projects aimed to support.
- 4.23 However, the pandemic had the effect of accelerating a move towards digital solutions and upskilling to help people access remote provision. Projects developed a range of digital resources and offers that included live streamed virtual classes, recorded sessions, and promoted online challenges and social media engagement to provide beneficiaries with different options for getting involved and remaining connected. There was a good deal of success with this approach and Projects reported that participation levels were initially strong, although in time, there was online fatigue.
- 4.24 There were some benefits too in terms of partnership development. With travel and face to face options greatly restricted, there was more time to connect with partners online and build relationships, especially with partner organisations based in different regions, which may not have happened otherwise.
- 4.25 Supporting independent participation: Projects assembled a range of physical resources as well as digital ones to enable their communities to take part in activity

in the home, independently or with family members. Equipment packs with activity cards, sports equipment and kit were distributed as part of HAF Projects.

Particularly for Projects working with families and young children, staff shared ideas and posted example videos on simple ways to keep active which gave parents a way of entertaining children using everyday household items to play games. They set themselves challenges such as walking certain distances, sharing pictures and inventing games that could be played in small spaces, indoors or outdoors. Home based and outdoor provision became far more prominent compared with indoor group sessions.

- 4.26 Adapting training provision: Many Projects had expected to recruit, train and develop volunteers as part of their delivery model to support HAF provision and sustainability plans. Providers began to adapt their existing face to face training modules to online versions and these were more efficient and cost effective with similar outcomes. However, some found that although individuals gained qualifications or completed training, they lacked confidence in transferring this learning into face to face delivery and sometimes needed further support to take the next step. There were examples of volunteers completing walk leaders training but wanting to take a supporting role rather than leading.
- 4.27 Flexibility: Clearly, this period had significant implications for the planned delivery of HAF at all levels from Programme through to Projects and participants. Flexibility at Programme level was evident in a) the practical extension of the funding period by a year and b) allowing Projects to try new approaches, work with different partners, adapt delivery plans and work in very different ways towards their intended outcomes. Projects that were working with a network of their own delivery partners also took this approach. It was widely welcomed by all stakeholders that the HAF was extended to a four year period with funding attached to this.
- 4.28 While delivery could not take place there was more bespoke consultation than might otherwise have been the case. There was space to consult with stakeholders and organisations connected to the target audience while delivery was paused. However, as the pandemic restricted Projects' ability to deliver over a sustained period, there was limited time for them to build relationships with participants and

establish the continuity that is needed to support behaviour change. The year extension went some way to alleviating this, although Projects recognised that pathways towards independent activity could take far longer for some individuals than even the extended period of the HAF.

- 4.29 Workforce resilience: From 2020 to 2022, Projects had a continued period of disruption where they had to react and respond to unpredictable situations and frequent changes in national and local guidance and restrictions. The people resource available fluctuated as staff were affected by illness, furlough, family responsibilities and isolation periods in the same way as their beneficiaries were. There was no substantial period of stability where new working practices could become established, especially in the early stages where Projects described ‘stop-start’ delivery making it very difficult to build up relationships with target groups. The commitment and motivation of Project staff and partners to maintaining and developing their HAF offer in such challenging circumstances was hugely positive, and Projects recognised that their services were a vital part of supporting communities.
- 4.30 Maintaining partnerships: Projects reported that progress in developing local partnerships was initially slower where organisational priorities changed to deal with the pandemic. However, once remote working options were in place, the pause allowed for time to plan and build relationships. Projects referenced the need to build in collaborative planning between partners from the outset and factoring in the time to do so, which was not always there prior to the pandemic. The space to consult with the target communities while delivery was paused enabled Projects to gain a deeper understanding of stakeholders’ needs and helped them engage with those target communities when delivery resumed.

#### *Covid-19 ‘recovery’*

- 4.31 There were varying speeds of recovery post-Covid, for both participants, and for the organisations involved in coordination and delivery. Some Project leads felt their participants had ‘forgotten’ Covid-19 while others found participants more cautious to return to activity. For some Projects, Covid-19 was ‘not over’ even at the time of



our 2023 interviews and continued to affect delivery (e.g. care home restrictions, outbreaks affecting the workforce).

- 4.32 Projects that saw a slower return to activity and planned ways of working therefore felt it took longer than intended to realise their goals and gather evidence to fully understand the outcomes of their intervention. Similarly, this sometimes affected progress in terms of developing local partnerships as organisational priorities changed because of the pandemic and slowed progress in volunteer development and training provision. The Year 4 extension was therefore key for some Projects to achieve their desired outcomes/sustainability.
- 4.33 The pandemic also raised awareness of the health benefits of being active and the increased risks of serious illness from Covid-19 for those who were overweight. The limited opportunities to go out and enjoy being active and meet others at the height of the pandemic made organised HAF opportunities particularly welcome. This helped increase the demand for HAF provision and delivery, especially when little else was operating. There was unexpected reach of the Programme beyond the original target groups through new ways of working (such as digital provision), through whole family involvement, extended geographical reach, and identifying 'hidden' target groups – people who were not connected to existing services and organisations who nonetheless could benefit from HAF activities. Thus new 'markets' emerged for some whilst other services were suspended.

#### *Programme support*

- 4.34 While governance arrangements and oversight of the programme were strong in the early phases, the onset of the Covid-19 pandemic triggered changes as the Programme partner organisations diverted staff towards an emergency response. Later in 2021, there were national shifts in priorities with the announcement of the [Cooperation agreement](#) and subsequent updates to the [Programme for Government](#). In addition, over the four year period of HAF, there were changes in staffing arrangements due to staff turnover.
- 4.35 These factors appear to have affected the level of engagement and involvement with the HAF at Project Board level more so than in the case of the Evaluation and

Delivery groups. Project Board meetings became infrequent. It was beneficial that there was a good level of consistency of staff represented on the Evaluation and Delivery Groups and this helped to retain institutional memory and gain in-depth understanding and learning from the whole process. However, capacity was stretched for these two Groups. Programme representatives suggested that in hindsight, an 'Operational Group' could have added value to the realities of delivery and the input required from Projects as challenges arose, including issues beyond those created by the pandemic. This Group could have been given sufficient autonomy to make (most) decisions in relation to Project queries without having to pass queries through more layers, which sometimes delayed progress at local level.

4.36 There were variations in the support that Case Officers could give to Projects and the support they received within their own organisation. They had a range of different skills and capabilities as they came from all three partner organisations with very different day to day work programmes and levels of autonomy to make decisions. Although guidance for Case Officers was given at the outset, in practice they found that it was not comprehensive enough for them to be able to respond to all the issues raised by Projects effectively, such as queries on finance and technicalities of monitoring and evaluation. For future programmes, a more detailed role description and training for Case Officers would be beneficial. The role was widely viewed as an important part of the structure of the HAF by Programme and Project interviewees. Potentially it could have value in any similar funds or interventions where possible. Case Officers benefitted from their involvement with the HAF. They reported learning and insights gained from exposure to different organisations and their ways of working, the developing of long term relationships and increased confidence in new subject areas.

4.37 Capacity: There was often no immediate replacement staff capacity for HAF work programmes if staff members' circumstances changed. This had a knock-on effect for Projects, and some felt disconnected from the Programme, especially during the pandemic. Case Officers took on HAF responsibilities in addition to an existing work programme and some were assigned only approximately half a day a week for their HAF work. Often, the resources required exceeded this at certain points in the

year. The Programme benefitted from having the consistency of some key members of the Delivery and Evaluation groups and Project Board from start to finish of the HAF.

- 4.38 Promotion: Projects would have liked to have seen more promotion at a national level to raise the visibility, profile and impact of the HAF. This would help Projects with local engagement, with buy-in, and in having greater impact, and would support any mainstreaming ideas and sustainability approaches. However, examples from HAF Projects were frequently used by Welsh Government officials to respond to Ministers' questions and several Projects - including Babi Actif, StreetGames, Living Streets, Action for Elders, Sporting Memories - had Ministerial visits.

### **Covid 'legacy', learning and innovations**

- 4.39 Despite the hugely challenging period, there were positive outcomes as a result of the adaptations made in response to the pandemic. Several Projects retained elements of the changes they made due to their success and innovations.

Examples include:

A blended approach to delivery: A mix of online and face to face opportunities extended the reach that Projects had. It helped to remove barriers for some individuals who may never have attended face to face activities – including those who were shielding during the pandemic and people who preferred to participate independently - whether this be from confidence issues about social mixing, meeting new people, a lack of resources, transport issues, time pressures and other commitments. It also meant that people living outside of Project target geographical areas could access online opportunities.

Training adaptations: adapting existing face to face training modules to online made some provision more efficient and/or cost-effective.

Increased digital literacy: In many respects the pandemic was a catalyst to improve digital capacity and upskilling in some smaller partner organisations. This put organisations in a position where they could have more frequent contact, although it required training for staff, volunteers, and sometimes beneficiaries to benefit from the enforced changes.

More partnership working and stronger relationships: Initially required to react to the pandemic, the ability to meet more frequently was one positive result of virtual meetings, removing time/travel/cost barriers of face to face meetings.

A legacy of virtual resources: Resources developed as part of early delivery remain as a bank of accessible opportunities that are a useful legacy beyond the pandemic. However, there was widespread agreement among Projects and partners that face to face approaches are preferable for relationship building, informal consultation, one to one informal support for individuals experiencing barriers and ad hoc generation and sharing of ideas.

### **Other key learning points**

- 4.40 Partnership: Learning was gained about partnership working including the need for upfront collaborative planning between partners, learning through different models of delivery, the importance of sound governance and stakeholder management, and the staff resources required to do this effectively. Projects embedded some of this in their organisational processes.
- 4.41 Investing time in consultation and coproduction is worthwhile: Projects reported gaining a deeper understanding of participants, supported by working with partners, and learning about specific subgroups and communities within their target audience. They applied this insight to provide bespoke and tailored approaches to meet different needs. Projects felt that variety in the delivery of session activities, places, times and delivery approaches (e.g. virtual or face to face) provided a good experience for more participants.
- 4.42 Sufficient resources are required: Projects spoke about the challenge of finding the capacity and expertise needed to capture participant impact effectively. This was more challenging where there was a consortium of partners or an extended partnership of organisations delivering different Project elements. Some Projects found that their initial allocation of resources to assessing impact was insufficient, and they had to re-assign or seek additional resources to be able to do it properly.
- 4.43 Monitoring methods: Tailoring monitoring and data collection methods to the particular activities and characteristics of each Project was critical. The HAF

attempted to do this through a 'twin track' approach of standardised tools and case study reporting, coupled with freedom for Projects to establish their own supplementary methods. The standardised tools only suited some participants and activities. The supplementary methods were chosen by Projects in collaboration with their own appointed evaluators and/or internal advisers, and as a result varied widely.

4.44 Community engagement: The significance of community engagement to enable Projects to access their target groups emerged as a major theme. This is addressed more fully in the next Chapter.

## **5. Community Engagement, Sustainability and Learning Process**

5.1 During 2021 in the early delivery phase of the HAF, a number of thematic areas of enquiry for our evaluation were introduced alongside analysis of the effects of the pandemic. These were (i) community engagement; (ii) sustainability and (iii) the learning process. These themes were explored across the two main delivery years of the Programme. In this Chapter we cover each theme in turn.

### **Community Engagement**

5.2 Community engagement was viewed by the Projects as involving, listening and responding to the views and needs of communities to make informed decisions about what, and how, to provide HAF activities. As noted in Chapter 4, community engagement work was heavily affected by the pandemic. During the lockdowns it became difficult for Projects to directly involve their intended end-users in consultation and co-production, and this prompted re-thinking about how to communicate with the potential beneficiaries. It brought into question which communities and which organisations it was possible to collaborate with, and meant that the needs and demands of communities might be very different from what Projects had envisaged at the outset. We discuss here how Projects were able to respond to the new context and the factors that enabled community engagement to take place.

### *Partnership working*

5.3 Community organisations became a more important gateway and voice for participants during the Covid-19 pandemic. Whilst face to face delivery was not possible, there was space and time to strengthen links with current and new partners. For some Projects, this led to a higher degree of co-development/co-ownership than had been originally envisaged. Partner organisations could help Project staff understand community needs when face to face access was impossible. The early emphasis on partnership working, asking for all partners involved to be named in HAF bids from the start, supported this process as it helped to create joint ownership of the Project and investment in a Project's success.

- 5.4 Projects felt that finding new partners and organisations and services which had direct contact with communities with certain characteristics was beneficial, and targeted specific partners who had specialist knowledge/understanding of the needs of particular sub-groups of beneficiaries. Projects also found it beneficial to build relationships with key individuals living in communities who could act as informal supporters and promoters. Living Streets offered an example: work undertaken during the first year of delivery in Butetown, Cardiff, highlighted the need to quickly connect with key figures in the community to provide support in overcoming language barriers, to ensure all members of the community could engage in the activities. This learning was shared throughout the Project and informed the ongoing engagement and delivery approach. Project staff attended meetings with key local community leaders to initiate relationships and disseminated communication materials about the Project in local shops, libraries, supermarkets, community centres and so on in order to raise awareness. StreetGames was another organisation that highlighted the importance of connecting with trusted individuals based in the communities they wanted to work in, key community members who were respected and familiar to residents. These representatives could facilitate introductions and helped the initial process of relationship building.
- 5.5 Partnerships were not always maintained as envisaged, and some consortium Project partners/providers withdrew from Projects. Reasons included revised approaches and staff changes following Covid-19, not renewing posts for Project staff created by HAF funding when postholders left, and the original intentions of offering in-kind support no longer being possible due to changes to work programmes. Projects found ways to work around this and adapted their models accordingly. As with any programme/organisation, staff turnover and recruitment caused gaps in continuity which could slow down engagement work. The required monitoring and evaluation connected with the HAF also proved to be a hurdle that had to be negotiated when establishing relationships – with the process being a potential barrier to community members and partner organisations where their activity providers also had additional roles in collecting data from attendees to support the monitoring and evaluation process.

5.6 Over time, more connections were made to link HAF activities with existing community provision, and many Projects described community engagement work as an 'organic' process. Connections worked in two directions – HAF activities such as walking groups could be added on as an additional opportunity for existing community groups. This 'outreach' service worked well as a means of working with small, isolated communities with travel barriers and covering large geographical areas. Training could be offered so that activities could continue without the need for HAF staff to always be present.

*'To meet the needs of the diverse range of families across Wales and the underrepresented areas of the community, we have built partnerships with organisations to deliver sessions to both families and practitioners, these partnerships have not resulted in any financial contribution but have added great value to the status and efficacy of the Project. These partnerships have enabled the Physical and Wellbeing messages to be filtered into these harder to reach communities.'* (Early Years Wales Annual Progress Report Year 3 2021-22).

5.7 Secondly, developing relationships with community groups meant that group leaders could help raise awareness of HAF opportunities and promote them to their members. Delivery partners and individual activity providers running sessions could play a role here by sharing other local provision, classes, services and groups they were aware of, helping HAF participants have more options and information about what was available in their local area.

#### *Flexible, tailored approaches*

5.8 The flexibility offered at Programme level supported Projects to adapt their plans. As one Programme interviewee commented, *'Covid was the main driver behind the flexibility to be more creative and try out things they would not normally do...it was helpful that HAF was very focussed on outcomes and outcome-driven, and not about how you did it.'*

5.9 Projects had often planned an initial period of consultation to further develop activity provision; however, Covid-19 restrictions meant that formal face to face engagement work had to be sidelined. There were unexpected benefits where



Project organisations were diverted in their duties and became involved in providing an emergency doorstep response. Their presence in communities offered a chance for informal conversations. Team members became visible and familiar to local residents and Project staff gained a better understanding of issues being faced in communities. The chance to meet people where they lived (rather than at activity sessions) was an advantage and helped build relationships, providing some of the groundwork for building trust prior to participants accessing activity sessions later in the delivery phase.

5.10 At the participant level, Projects reported that maintaining a fairly informal and flexible approach in terms of allowing participants to engage with the activities was beneficial, less intimidating and more inviting for target beneficiaries. Projects achieved this in a variety of ways including:

- Introducing a range of communication options (e.g. website, phone, face to face, email, Facebook groups and WhatsApp) for participants to register/book Project activities, ask questions and get in touch with Project coordinators;
- Making things accessible and low cost – designing activities that used everyday household items and providing free resource packs and equipment for individuals to keep;
- Adapting existing activities for different abilities – walking projects and walking groups frequently did this including running virtual walk programmes and challenges and providing mobility aids to improve physical accessibility to the walking activity on offer;
- Ensuring as far as possible that sessions were delivered by Welsh speakers as well as English in predominantly Welsh speaking areas (although a shortage of staff with the required qualifications to deliver certain activity types who also speak Welsh sometimes limited the options available) and drawing on staff and volunteers with language skills in the diverse range of languages spoken across ethnic groups with whom Projects were working; and,

- Embedding activities within target communities, for ease of access, fostering a sense of autonomy and ownership among the groups to maximise the chances of activities being sustained.

#### *Social prescribing and referral processes*

- 5.11 Several Projects (e.g. Small Woods (Actif Woods): Social Prescribing the Woodland Way, West Wales: Walking for Wellbeing and BeActive RCT) explicitly included elements of social prescribing and community referral as part of their engagement models. Others extended their networks over time, gaining more connections with partners who supported an informal inter-referral process.
- 5.12 Projects that had planned to work in partnership with the health sector and develop formal prescribing routes via GP surgeries, had to adapt their approaches because the NHS workforce was focused on responding to the pandemic. Nevertheless, some made significant progress. For example, the Small Woods (Actif Woods) Project established links with many health and support services over the 4-year project. Its final report references working with over 200 different referral partners including MIND, Flying Start, Mental Health Services, Community Connectors, Refugee Support and GP surgeries. The Project provided a referral route on their website and a portal for people to self-refer to activities in their area.

*‘To promote our services further, we hold annual stakeholder events in each region and have held immersive events for GPs and Health Professionals in many of the project areas – this included two hospital event days in collaboration with Natural Resources Wales engaging 150 trainee GPs in Monmouthshire and Rhondda Cynon Taf. The latter resulted in a 6-week programme of events being developed for a GP surgery. We have undertaken consultation with GPs to try to establish better and more consistent routes to social prescribing’. (Small Woods (Actif Woods) End Fund Project & Evaluation Report)*

- 5.13 West Wales: Walking for Wellbeing shifted the focus of their model to engage participants via community organisations instead of the planned GP practices, describing the process as *‘signposting rather than true social prescribing’*, while in the latter period of the Project, it was able to reconsider the GP route again and

start to develop partnerships. However, the Project also noted the limited capacity to support prescribing and referral in West Wales: *'It has been difficult for a time limited project such as ours to provide the additional capacity that is sometimes needed to enable referrals to happen'*. Referral pathways and intentions can be set up, but essentially there needs to be something to refer to. If opportunities such as HAF and other similar activities are time-bound due to short-term funding and limited capacity to cover a whole geographical area, then social prescribing routes are likely to be stop-start and localised, benefiting small numbers, rather than offering a consistent level of access and support for communities.

#### *Connections with wider services*

- 5.14 Projects also found that as they developed an understanding of participants, local contexts and the community barriers, it was possible to offer more holistic support to communities and individuals. Inter-referral and linking up to work with different groups of people who are connected with different agencies worked well. Inter-referral supports the needs of individual participants who can then benefit from related services/offers nearby. Connections were made with wider service areas and organisations supporting mental health, older adults, provision of food and warm spaces and cost of living support, and much more.

*'When we receive support from family services, we notice increased attendance from the harder-to-reach families. Family support workers have usually built trust with the communities they work with, understand the communities and go beyond digital engagement. Whilst this type of engagement happens in some areas, it doesn't in others. The number of attendees at certain sessions reflects this. This supports the need for an engagement role as the Project continues to grow.'*  
(Babi Actif End Fund Project & Evaluation Report).

- 5.15 For many Project organisations this way of working is embedded in their approach beyond the HAF programme, and supported through roles such as community connectors, doorstep sport advisors and so on. This took place where the lead organisation had a coordinating role across a network of community groups and providers.

*'The establishment of 4 outdoor health clusters (via our match funding) has developed a more cohesive network of providers and referrers that provides a direct route from social prescribing to outdoor activities (working in partnership with others we have been able to refer participant to Animal Assisted Therapy with Donkeys, Wild Swimming, Paddleboard, Dog walking therapy, Woodland Wellbeing Groups and Gardening and Food Growing Groups.'* (Small woods (Actif Woods) End Fund Project & Evaluation Report).

#### *Community Engagement learning points*

- 5.16 Effective partnership working – This is central to community engagement and implementing community centred approaches to planning, delivering and evaluating projects<sup>33</sup>. This was reflected in many HAF Projects. Having the right partners was key to finding out what is needed and breaking down barriers to participation in HAF activities.
- 5.17 Involve partners and participants in the planning phases - Importantly, the HAF has highlighted the significance of developing relationships as early as possible, to provide an effective foundation for delivery and help shape the kinds and modalities of activities and engagement offered by the Project. This was particularly important when providers targeted groups they had not previously worked closely with.
- 5.18 Stronger Community Leadership – Covid-19 stimulated stronger community leadership and promoted greater cross agency working and signposting between services. There is evidence from interviews and Project materials to show that community and Project leaders have been more flexible, more open to doing things differently, and more determined, especially in the face of the challenges created by the pandemic.
- 5.19 A face to face presence – This is preferred by Projects for developing trust and providing opportunities for one to one conversations with new/prospective participants 'aside' from the group sessions. Having an on-the-ground presence in local communities through trusted partners supports engagement with new target

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<sup>33</sup> \* E.g. Public Health England 2015: A guide to community-centred approaches for health and wellbeing

beneficiaries, especially when working with Black and Minority Ethnic groups. Those partners can facilitate ‘introductions’.

- 5.20 Appropriate resources allocated for community engagement - Project staff need sufficient capacity to coordinate and develop partnerships with organisations that are connected to participants. It can be resource intensive, especially when developing new relationships and understanding of the mutual benefits and requirements. Some Project roles and responsibilities were adapted over time to ensure they had sufficient capacity to undertake engagement work.

### **Sustainability**

- 5.21 Sustainability was an early and important consideration for the Programme and designed into the process. Sustainability of Projects was referenced in financial terms in the Programme documentation. The Call for Applications and Guidance advised that potential applicants *‘should be aware that the HAF will provide grant funding for 3 financial years which will be tapered in the final year’*. *‘Only Projects that demonstrate they can be funded into the third year and beyond or will leave a legacy that will sustain the Project activity beyond the third year will be considered’*. The tapering of funding in the final year was designed to encourage early consideration of exit routes and Project closure, and the consequences for ongoing activities. During Stage 2 of the application process, a presentation on sustainability was made by Programme representatives, and in November 2021, an online learning event for Projects focussed on sustainability.
- 5.22 The Theory of Change model set out a long term outcome that *‘HAF Projects demonstrate approaches that are sustainable, scalable, and replicable’*. Our evaluation considered definitions of ‘sustainability’: what it meant to different stakeholders, and the ways in which it might be realised at different levels, from participant through to policy.
- 5.23 We found surprisingly little material in the UK academic or policy literature on sustainability. One key author suggests that sustainability refers to:

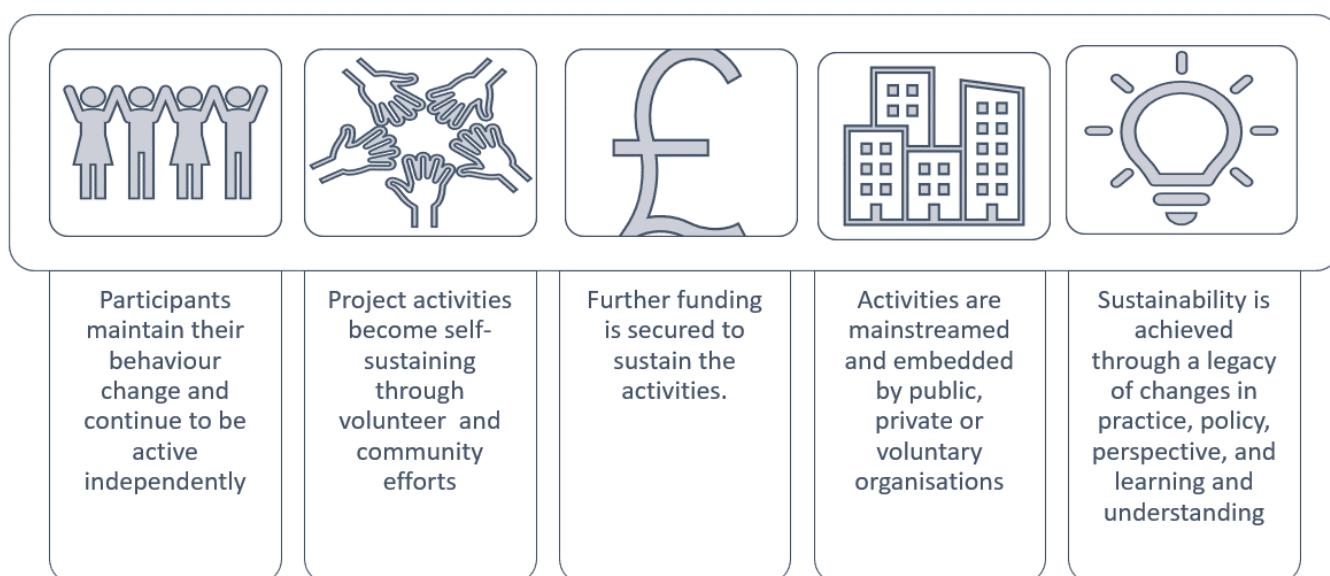
*‘the continuation of a project’s goals, principles, and efforts to achieve desired outcomes. Although many grantees think that guaranteeing the sustainability of a*

*project means finding the resources to continue it ‘as is’ beyond the grant period, ensuring sustainability really means making sure that the goals of the project continue to be met through activities that are consistent with the current conditions and resources that are available.*<sup>34</sup>

From a Non-Governmental Organisation point of view, *‘it means continuing to perform and deliver project benefits to the primary target group after the funding from a donor terminates’*<sup>35</sup>

- 5.24 Sustainability may not require a project to continue to exist. It may be possible to achieve lasting impacts by instilling new norms that become ‘mainstream’ or to effect irreversible change – for example by changing structures or legal frameworks. However, sustaining new habits may require repeated practice and on-going support.
- 5.25 In our considerations based on the literature of how sustainability could be realised through the HAF Programme, a number of layers or paths to sustainability were identified, as shown in Figure 5.1 below, developed by UKRCS.

**Figure 5.1 Paths to Sustainability**



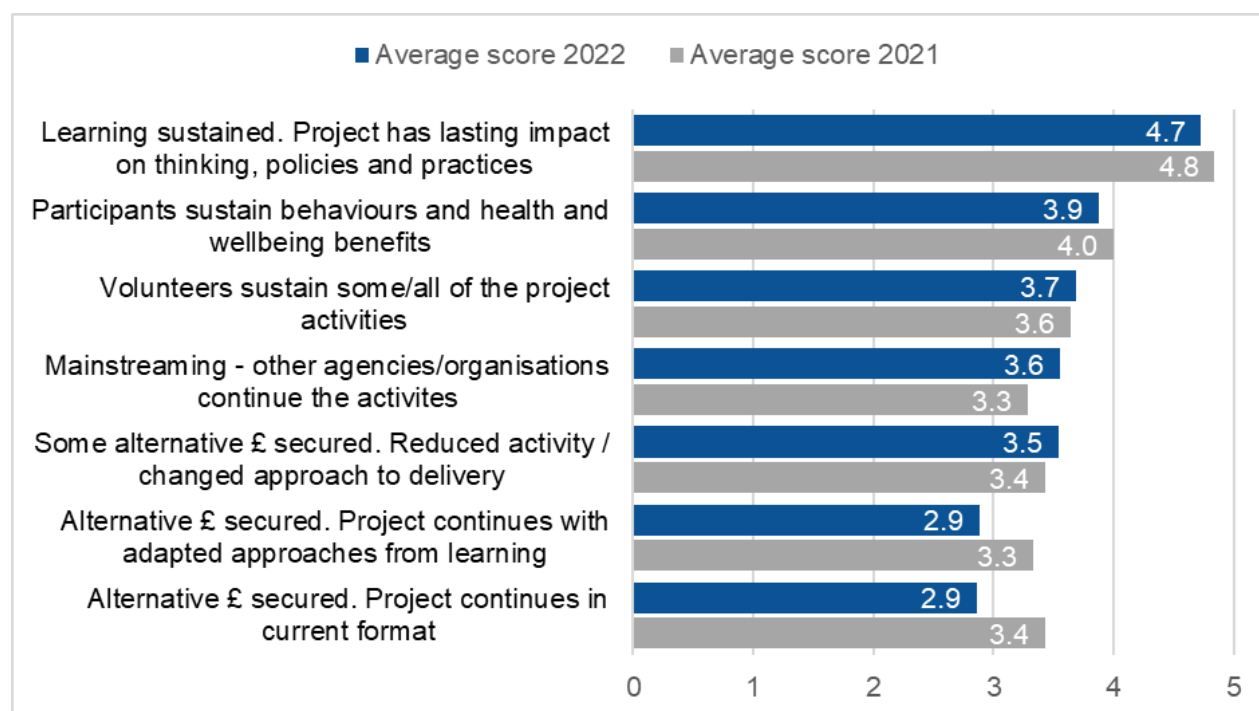
- 5.26 We explored Project views on these categories in interviews in 2021 and revisited this in 2022 so they could reflect on how their thinking and options may have

<sup>34</sup> Riggs, (2012)

<sup>35</sup> fundsforNGOs. Available at: [Understanding sustainability.](#)

changed. As part of the interviews, Project representatives were shown a series of statements about sustainability and asked to rate the likelihood of these options taking place after HAF funding ends. Figure 5.2 shows the results.

**Figure 5.2: Likelihood of Project activity being sustained in different ways** – Project ratings where 1 = not at all likely to 5 = very likely.



5.27 **A legacy of learning to inform policy and practice at strategic level** - In 2021, Projects had not developed comprehensive sustainability plans, but it was already under consideration, informed by the learning they were gaining from delivery. By 2022, sustainability planning was taking a higher priority. During interviews undertaken in 2021 and 2022, there was a high level of agreement among Projects that the main longer-term impact of the HAF was the learning being generated, creating a legacy of lasting impact on organisations’ thinking, policies and practices.

5.28 **Sustainability at the participant level and sustaining activities through volunteers** were the second and third most likely outcomes for Projects. Projects provided evidence in evaluation reports that participants were self-sustaining the behaviour changes instigated through their involvement in HAF Projects. This included:

- Continuing to be physically active independently;
- Engaging in non-HAF activities introduced to them through HAF activity providers, such as going to paid-for sessions the provider also runs;
- Groups maintaining weekly HAF sessions without a paid provider, in between Project-run fortnightly HAF sessions;
- Continuing to socialise with other participants and friendship groups that were formed during HAF provision and becoming more involved in their local community; and,
- Participants becoming trained volunteers, helping to run sessions on behalf of the overarching HAF Project.

5.29 **Mainstreaming/embedding HAF activities in organisations and work programmes** - Achieving sustainability by embedding activities in wider work programmes was considered more likely in 2022. As observed by a Case Officer: *'The distinction here is more between sustaining engagement with participants at scale post the HAF Project which could be challenging, and there may be a more promising element which is creating a cadre of trained people who could sustain the approach'*.

5.30 There have been specific examples of how this can take place. One partner organisation in the StreetGames Family Engagement Project revised job descriptions to include elements of the role undertaken during HAF. Action for Elders referenced the additional insight gained that informed core delivery:

*'With the support of the HAF funding, we also invested in research and evaluation to inform and develop our core programmes in Wales. This vital investment ensures that we are well-placed to respond to the urgent and changing needs of older people in communities across Wales. Older people are facing an epidemic of social isolation and loneliness. Over the last year, we have supported older people to combat loneliness, which requires a more in-depth level of support to help the individual address their personal experience of loneliness.'* (Balanced Lives for Care Homes, Project representative)



Others retained HAF Project staff through permanent or extended contracts to continue to offer and develop HAF activities.

5.31 **Additional funding achieved** - Between 2021 and 2022, the perceived likelihood of gaining additional funding to support some, or all, of Project HAF activities decreased. This position had not changed in our last round of interviews in 2023, with local services and national budgets under significant pressure. Some Projects had been successful in bids for alternative funding and grants (and had also had some applications rejected) but generally additional funding gained was short-term and so the stop-start element of delivery remains. This affects Projects' ability to build relationships and provide consistent support over a sufficient time period for participants to develop long term behaviour change.

5.32 Although most Projects expected to maintain elements of HAF, it was likely to be at a reduced level:

*'We will however require further funding at the end of the programme. While this (HAF) is a significant step forwards, and a sustainability element has been built in, we do not envisage that our work could continue without being paid for by someone. If we can encourage the health sector to support some aspects of the work following the project, that would be one way forward'. (Project representative<sup>36</sup>)*

5.33 Part of the evaluation process will involve a follow-up with Projects in 2024 to consider sustainability a year on post funding.

### **The Learning Process**

5.34 In our 2021 interim report, we identified that systematic harvesting and packaging of learning from Projects or through Highlight Reports to inform the Project Board was not taking place. We suggested that learning processes could be improved through more scrutiny and challenge and sharing of insights across Projects. Consideration was also given to whether a Programme such as the HAF is suited and organised for the purpose of generating usable evidence for policy change and development.

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<sup>36</sup> To ensure anonymity, some quotes from Project interviewees throughout the report do not identify the Project name or organisation.

With the agreement of the Project Board, 'Learning' became a theme for the Programme Evaluation. In this section we consider Programme and Project-led learning mechanisms, knowledge transfer and knowledge retention.

### *Programme-led Learning*

- 5.35 The Programme has had a focus on the importance of learning throughout. This is supported by the monitoring and evaluation requirements, guidance documents, presentations at application stage and the direction to allocate a proportion of grant resources to support the learning, monitoring and evaluation process.
- 5.36 From late 2020, online learning events for Projects were organised and chaired by Programme representatives. These were seen as a way of bringing Projects together to encourage collaboration and sharing – both what worked, and what did not. The learning events involved various presentations from the national partner organisations, including an update on interim findings from RCS's evaluation. The main focus, however, was Projects themselves presenting their own learning at different stages. For example, at one event, four Projects presented for around ten to fifteen minutes, followed by questions and discussion, and shared resources, reports and videos they had created.
- 5.37 Generally, these events were well-received, and Projects would have liked more of them, although not all of them attended. Programme staff organising the events felt that over time, there was less engagement from Projects. It may have been easier for Project staff to be more involved in these sessions during lockdowns, whereas they had less time to be desk-based when delivery was well underway. Some Projects explained that they preferred other ways of learning and collaborating, did not enjoy working online, and that digital fatigue had set in. Some suggested they would have liked in-person events which offered more opportunities for informal conversations and one to one and face to face discussions, although they recognised the difficulties of HAF organising this with increased costs, travel times and logistics of finding dates where sufficient numbers could attend:

*'We would have liked more contact with other projects through events organised by HAF. Especially face to face ones once Covid restrictions lifted.'*

*This would have helped us learn from other projects and work through any challenges together.*' (Project representative)

- 5.38 Formal opportunities for cross project learning and networking, organised centrally, were fewer in the last funding year and there were no learning events. This is important, as this was the main mechanism for 'horizontal' learning. In the round of interviews undertaken in late 2022, six Projects commented they had learnt from other Projects via the learning events, but not outside of that.
- 5.39 On a Project by Project basis, however, Projects had the opportunity to book 1:1 sessions with the HAF Evaluation Group to raise any evaluation-related questions. Case Officer liaison continued, and Case Officers provided feedback on Project Highlight and Annual Progress reports. This was welcomed, although it did not support cross Project learning in a meaningful way as it might have done. Similarly, although the Programme made arrangements to bring Case Officers together for meetings to share experiences, attendance tailed off and staff turnover and shifting work priorities meant this proved difficult to maintain throughout.
- 5.40 A senior HAF Programme Level actor played an important role in harvesting learning to be shared at Programme level. In March 2022, a summary paper<sup>37</sup> was produced for the Project Board compiled from Project Highlight Reports. In October 2022, a Project Sustainability Summary Report<sup>38</sup> was produced, drawing submissions from Project Annual Progress reports where Projects had been asked to provide an update on their sustainability plans. At the time of writing, representatives from the group were reviewing learning from Project final reports and independent evaluations.

#### *Project-led learning and enablers*

- 5.41 At Project level, there was a high level of agreement that HAF would have lasting impact on their own organisations' thinking, policies and practices. The effective collaboration with the partners enabled a process of ongoing learning and reflection

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<sup>37</sup> Project Board Paper: 2022.03.28 - DOC 4 - Healthy & Active Fund Project Board - Summary of HAF project highlight reports February 2022

<sup>38</sup> Project Board Paper: 2022.10.10 - DOC 4 - Healthy and Active Fund - Project Sustainability Summary Report

on how the project activities could be best designed and implemented to meet the requirements and preferences of the target beneficiaries. This was important to encourage participation and foster a sense of ownership by the beneficiaries.

- 5.42 Projects reported that having locally based Project Officers assigned to different geographical areas worked well when there was an opportunity for them to reflect on their respective participants and local communities, and share ideas and things that had worked. This then informed the design and the delivery of tailored activities in other areas. Regular Project partnership meetings, steering groups and network and celebration events were all mechanisms used to help this process.
- 5.43 Having specific roles and responsibilities for learning was another enabler. In one Project, a HAF staff member became the People Development and Learning Manager, allowing knowledge gained from HAF to be absorbed across the whole organisation.
- 5.44 System-wide learning was identified. There was feedback from Projects that they made changes to the way they operated as a result of their learning through HAF. This is evidenced through changes to internal policies and processes for working with volunteers, rolling out training, maintaining the digital resources developed through HAF and communicating success through sharing videos/insight.

#### *Knowledge Transfer*

- 5.45 At present, much of the activity for sharing knowledge gained through HAF is taking place at Project level and independently. It is being shared with Projects' own networks but not necessarily between HAF Projects. Through Projects' End Fund Project & Evaluation reports we have extracted some examples of how Projects are transferring knowledge more broadly:
- *'Wider impact is also being created, with the project being featured in the Open University's Children's Research Centre seminar series in July 2023.'* (Welsh Active Early Years Programme, Early Years Wales)
  - *'Academic paper to be published regarding this intervention, to inform and expand the academic knowledge in this growing field.'* (Opening Doors to the Outdoors, The Outdoor Partnership)

- *‘Sporting Memories offered online training and continue to do so for new volunteers, saving volunteers time in travelling. They also offer UK-wide twice monthly volunteer learning sessions online, for volunteers to drop in, share ideas, ask questions & generally maintain connection with other volunteers.’* (Sporting Memories, Sporting Memories Network CIC)
- *‘Developed an induction process for new session leaders and a quality assurance document for all sessions/facilitators to ensure quality of delivery and brand consistency.’* (Babi Actif, Eryri Bywiol-Cyf)
- *‘Learning from the project is informing delivery by Newport Live of other sports / wellbeing related programmes.’* (Healthy and Active Newport, Newport Live)

5.46 Case Officers reported that they had also benefited from developing professional relationships through their role in the HAF. One noted that this had been both enjoyable and worthwhile; and learning from HAF Projects had crossover to other work in their own organisation. The role had therefore been very beneficial in enabling them to gain new learning and apply the insight elsewhere.

#### *Knowledge Retention*

5.47 At national level, Projects suggested systemic change is required in order to ensure more effective learning of the lessons from the HAF, but questioned who can lead the higher level conversation needed to influence policy. Several Projects hoped for project legacy that was sustainable for future generations and felt that this could take place if knowledge was shared. Whether this occurs at Programme level is not yet clear, and establishing an accessible repository of the learning may be something to consider. In evaluating the longer term impact of the HAF, it is important to recognise that at the end of the funding period, many Project staff on fixed contracts left their posts. Institutional memory will be fragile and insights these staff hold may be lost if they are not captured in post-programme evaluation work.

5.48 Currently, Projects have been feeding learning ‘upwards’ but are unsure where and if this is being made use of. This was also questioned by Programme representatives: *‘The learning will be in the hands of key actors and it is not clear where the dissemination strategy is. The active sharing of learning, or the lack of it,*

*is a weakness in the system. It could be done. There is no obvious destination for the policy lessons.'* Another suggested: *'The question is where are the key points of learning, and what are we doing with those? If we don't distil the learning from the programme we have missed an opportunity.'* At present, there are no clear mechanisms for sharing learning, but national partners can address this. One option may be for the Project Board to consider assembling the collective learning and impact from Projects in some form of accessible repository for the future. However, raising awareness and tailoring and communicating the insight to different audiences will require further resources.

- 5.49 At Programme level, the intention had been to hold a conference, involve health boards and showcase the work. Some consideration has been given to paying for videos of the projects and sharing them<sup>39</sup> but the current budget constraints on HAF Programme representatives in Welsh Government means this has not happened. Several Programme actors referenced their disappointment that this could not take place as part of the formal closure of the HAF.

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<sup>39</sup> Many Projects have created their own videos.

## 6. Project Outcomes

6.1 This Chapter provides an overall assessment of Project level outcomes. It draws on the monitoring and evaluation data collected by Projects during the four years of the HAF and considers both the quantitative monitoring data that Projects submitted as part of Programme requirements, and the individual evaluations undertaken by Projects themselves. We consider a) participant outputs and outcomes, including wider community and societal outcomes, and b) Project organisational outcomes<sup>40</sup>.

### Participant output data

#### *Outputs*

6.2 As referenced in Chapter 2, as part of their funding conditions, Projects were required to collect a set of quantitative data using specified measures of physical activity and mental wellbeing, along with attendance data and participant demographics.

6.3 Attendance data and participant demographics included:

- Overall number of individual participants;
- Number of sessions attended;
- Gender;
- Age group;
- Ethnicity;
- Disability;
- Economic activity i.e. retired, paid employment, student etc.;
- Welsh Index of Multiple Deprivation (WIMD) decile; and,
- Urban-rural classification.

6.4 To assess the effect of the Programme on levels of physical activity and mental wellbeing, Projects were required to collect baseline and follow-up data, using specified tools, as follows:

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<sup>40</sup> We provide a summary of each of the 16 Projects in Annex 1. These summaries report against a standardised template.

- **Physical Activity** - the International Physical Activity Questionnaire (IPAQ), (which is validated for ages 15-69, for healthy populations) or the Physical Activity Questionnaire for Children (PAQ-C), (validated for ages 4-14, for healthy populations).
- **Mental wellbeing** - the Warwick-Edinburgh Mental Well-being Scale (ages 13+ for healthy populations and people with mild to moderate cognitive impairments), or the Stirling Children's Wellbeing Scale (validated for ages 8-15, for healthy populations).

6.5 Projects were provided with guidance via the Evaluation Toolkit about the timescales for gathering this data:

*'Collecting data that measures the outcomes (e.g. physical activity) of projects with defined start and finish periods typically takes place before and after the participants' time with the project and then again at 6 and 12 months after the last session they attended. For projects that don't have defined start and finish points (i.e. rolling drop-in projects) then more flexible data collection dates may be more feasible.'*<sup>41</sup>

6.6 Each Project was provided with an Excel template for submitting this data. This included a guidance page, setting out the need for consistency, referencing a Core Questions document for wording, and providing links to guidance notes and scoring protocols for the specified tools. The spreadsheets intentionally did not include any personal data.

6.7 Projects were asked to submit test data on their Excel template during November 2019, the purpose being *'to enable the HAF evaluation group to identify any problems with the data at an early stage and work with projects to resolve these.'* Thereafter, data returns were to be submitted annually, with the first data return scheduled for May 2020<sup>42</sup>.

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<sup>41</sup> HAF Project Evaluation Toolkit January 2019

<sup>42</sup> HAF Grant Offer Letter



*How many people took part in HAF?*

- 6.8 Most Projects set targets for the number of participants they intended to engage with, and included varying levels of detail such as target numbers for different activity providers, target age bands or the activity type to be counted – e.g. one off activities or blocks of sessions. They also set targets for the number of sessions delivered, number of organisations worked with, volunteers recruited, and volunteers and workforce trained. Due to the pandemic, some targets were revised part way through the four years in agreement with HAF Programme representatives. Some targets were revised upwards, others downwards.
- 6.9 Based on the quantitative outputs reported in Projects' final evaluation reports, eight of the 16 Projects that continued operating for three or more years met all the numerical targets they had set, and six met most or part of them<sup>43</sup>. In many cases, Projects exceeded their targets for some indicators.
- 6.10 Using data from Excel spreadsheets submitted by Projects to Welsh Government, overall, **12,028** people are recorded as having taken part in HAF Projects. The actual number of beneficiaries is likely to be substantially higher for a number of reasons where participation was difficult to record, including:
- Independent participation, such as HAF walking challenges and home based activities inspired by Projects;
  - Independent use of virtual resources prepared by HAF Projects, that were available to access at any time online;
  - Logistics and ethics of capturing personal participant registration data as part of live-streamed virtual classes and online sessions;
  - Restrictions on paper-based data collection processes during Covid-19 and initial lack of digital options for capturing data as an alternative to paper; and,
  - Capturing data at one-off Project events and tasters.

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<sup>43</sup> One Project did not have numerical targets. Note also that where targets are described as 'met', this refers to targets as revised and communicated to HAF Programme actors. In some cases this was as a result of funding delays, and for others it was the result of pandemic conditions and restrictions.

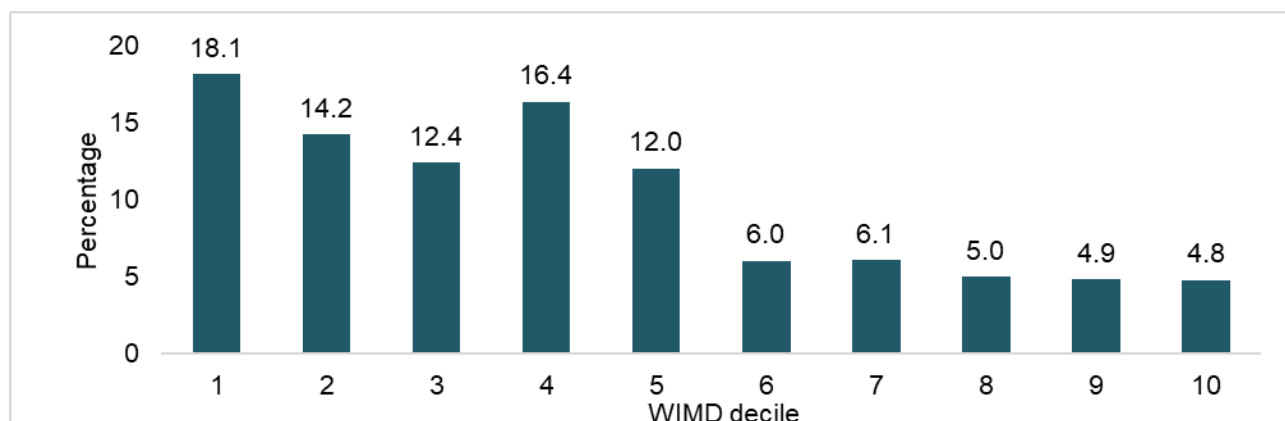
6.11 For the 12,028 individuals recorded by Projects, some demographic data is available shown in Table 6.1.

**Table 6.1 Number of Participants recorded by HAF Projects**

Number of Participants recorded by HAF Projects	
<b>Total</b>	<b>12,028</b>
<i>Gender</i>	
Female	7,680
Male	4,045
Identify another way	19
Participant refusal / prefer not to say	123
Missing data, not specified etc.	161
<i>Ethnicity</i>	Number of Participants
Arab	68
Asian/Asian British	514
Black/African/Caribbean/Black British	146
Mixed ethnic group	141
White	9,522
Participant refusal and prefer not to say	1,088
Missing data, not specified etc.	549
<i>Health and disability</i>	Number of Participants
No health condition or disability	8,686
Yes, limited a little	1,264
Yes, limited a lot	793
Participant refusal and prefer not to say	724
Missing data, not specified etc.	561

- 6.12 Gender: Overall, almost two thirds (65.4 per cent) of participants where gender was recorded were female. The higher proportion of female participants is partly related to Project type. For example, the Women Connect First Project, Healthy Body Healthy Mind, was female only and had 496 participants registered. The majority of parents recorded participating in Babi Actif were female, with 1,176 female participants compared with 16 male. Excluding these two Projects from the calculation would give a figure of 40 per cent male. Projects such as West Wales Let's Walk: Walking for Wellbeing also observed a higher proportion of female participants.
- 6.13 Ethnicity: Around nine percent of participants where ethnicity was recorded identified as non-White.
- 6.14 Disability: Just under a quarter of participants recorded a health condition or disability. For comparison, the National Survey for Wales recorded 36 per cent of adults in Wales with a limiting long-standing illness, disability or infirmity in the year 2022-23. It should be noted though that 11 per cent of HAF participants chose not to provide this data or it was unrecorded.
- 6.15 WIMD decile: A key purpose of collecting demographic data such as WIMD, health and disability, was to assess whether HAF reached its target beneficiaries, and the data suggests that it did so in terms of reaching people in areas of deprivation. Almost a third of HAF participants lived in WIMD decile 1 and 2 areas, which represent the most deprived areas. Almost three quarters lived in WIMD deciles 1 to 5 (see Figure 6.1).

**Figure 6.1 Percentage of participants and WIMD decile**



### **Participant outcomes**

#### *Assessing physical activity levels*

- 6.16 The IPAQ data collected are very sparse. Eleven Projects collected some baseline data and nine of these collected some post-intervention responses. There were just over 3,000 baseline responses collected in total (approximately a quarter of the overall number of participants recorded) and approximately 1,300 follow up responses.
- 6.17 Three Projects collected physical activity data for children using PAQ-C including 1,235 baseline and 767 follow-up responses.

#### *Mental Wellbeing*

- 6.18 Thirteen Projects collected data using Warwick Edinburgh Mental Wellbeing Scale (WEMWBS). There were 4,759 baseline responses (approximately two fifths of the overall number of participants recorded) and approximately 2,350 follow-ups. One Project used the short version of the scale.
- 6.19 Three Projects used the Stirling Children's Wellbeing Scale, with a baseline of 1,834 responses and 1,324 follow ups.
- 6.20 As with the IPAQ and PAQ-C, projects recorded follow-ups under three headings: (i) post participation (ii) 6 months post participation and (iii) 12 months post participation. Few Projects had yet recorded data in all categories, although some additional 6 month and 12 month post participation data is expected in final data to

be submitted in May 2024. As was recognised from the outset as an inevitable corollary of different Project models, follow up data for assessing wellbeing was collected at different stages. The follow-up data collected at different time frames was also not necessarily for the same individual participants who had provided a baseline response.

6.21 Our assessment found that of the Projects using these tools to measure increases in physical activity and mental wellbeing:

- Four Projects provided evidence of increased physical activity using IPAQ<sup>44</sup> and seven had inconclusive data (either due to low quality data limiting the extent of the analysis that could take place, or results themselves showed no clear pattern); and,
- Five Projects provided evidence of increased mental wellbeing<sup>45</sup> using WEMWBS and six had inconclusive data (again, either due to low quality data limiting analysis, or results themselves showed no clear pattern).

### **Challenges in data collection**

6.22 **Suitability of tools** - From the outset, Projects raised concerns about the appropriateness of the IPAQ and WEMWBS tools for various HAF target groups, along with their validity for different age groups. There was some flexibility with this from the Programme, such as for early years Projects, family groups and older adults, and specific communications were issued to help clarify the position.

6.23 There were, however, continuing misunderstandings about the degree of available flexibility. One Project representative noted that their Project worked extensively *‘with people with learning disabilities, we did a focus group with some but couldn’t record them as beneficiaries because they couldn’t complete the [HAF] forms.’* But from the HAF Programme’s perspective:

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<sup>44</sup> In their final evaluation reports, these four projects reported increases in average scores from baseline to follow up.

<sup>45</sup> Some projects reported increases in the average WEMWBS score post-participation, some reported the number or percentage of participants who had higher individual scores post-participation.

*'The beneficiary could have been given a participant number and recorded in the spreadsheet without any demographic or outcome data, perhaps only attendance data. Missing data labels were provided which could have been used for these participants. And projects were encouraged to use other ways to measure outcomes that were relevant to their specific project.'* (Programme representative)

- 6.24 Our Process Evaluation Report identified that many Stage 2 applicants found the monitoring and evaluation processes challenging, and the requirements were, as they expressed it, a 'shock' to several, despite monitoring and evaluation being highlighted from EoI stage early on. During interviews for the Process Evaluation, around half of the 17 successful Projects expressed concern about managing the requirements.

*'There is quite a large amount of quantitative data to be collected, and from our experience both participants and staff find this a challenge, off putting, and that it impacts negatively on participant experience. Even the minimum we need to collect is a lot for this target group of participants'.* (Project representative)

Some Projects tested adapting HAF tools to create participant-friendly versions to suit their audience (e.g. StreetGames), and some also used existing organisational tools to measure outcomes (e.g. Action for Elders used EQ-5D-5L). Qualitative approaches, as well as quantitative were supported from the outset.<sup>46</sup>

- 6.25 Skills and experience - Whereas some Projects had experience with this type of data collection (usually larger organisations), or brought in external expertise and capacity, for others it was new and presented challenges. Project leads did not necessarily have a background in monitoring and evaluation. Where multiple partners and activity providers were involved in delivery, Project leads had to communicate the data collection process to others and ensure that those leading

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<sup>46</sup> It is worth noting that the PHW-led 'HAF Learning Lessons from Evaluation Experiences Project' (forthcoming, 2024) backs up the findings here and looks at them in a little more detail given its narrower focus.

sessions and in contact with participants could administer the tools and gather the data as well as delivering their session.

- 6.26 Covid-19 - During the pandemic, when social distancing and avoidance of sharing equipment was in place, collecting data on paper based forms had to be re-thought. Where Projects had to change their systems with some setting up online data collection, they reported benefits longer term including online systems removing the need for data entry, improving data quality and potentially being more secure where personal data is collected.
- 6.27 Participant experience and Covid-19 effects - The tools also had some unintended adverse effects on individuals who found the tools intrusive and upsetting. This was especially true in relation to wellbeing statements used in WEMWBS in the light of personal experiences, illness and bereavement due to the pandemic. Project staff felt that well-being effects and evidence collected through WEMWBS may have painted a more positive picture had it not been for the impact of Covid-19. Many of the target populations that HAF Projects were working with had been disproportionately affected by the pandemic. It was not surprising if some pre and post data suggested a decline in participant's mental health. Projects believed that they may have helped to mitigate some of the effects of the pandemic on wellbeing, but it was not possible to determine this or to quantify it.
- 6.28 Quality of data at Programme level - Some Projects were not designed in a way that fitted with the idea of capturing pre and post data collection before and after a block of delivery sessions. Indeed, the Programme itself grappled from the earliest stages with the issue that the meaning of pre and post data collection would vary across Projects due to their different delivery models. Activity provision was generally more flexible. Projects offered multiple activity types and sessions to their participants, often through several different activity providers or partner organisations. In addition, there might be tasters and one-off events, as well as the options created during the pandemic to take part independently and/or remotely. There were staggered data collection periods due to different Project start times, affecting central collation and reporting of findings.

6.29 The quality of data input also causes problems for assessing impacts on different groups. For example, Projects did not all use the standard age bands provided in data submitted for reporting (upwards of sixty different age bands were used, with overlap between them). Rather than using the closed categories provided for the question on participant health and disability, some of the data included open-ended responses that made some answers difficult to categorise.

6.30 Embedding monitoring and evaluation before Projects start work is clearly good practice. Projects would have appreciated greater involvement in the design of the monitoring and evaluation processes. They also felt that the guidance might have encouraged a greater degree of flexibility in the tools used with different groups of beneficiaries<sup>47</sup>:

*Whilst the intention was good to have all projects evaluated using the same measure - WEMWBS and IPAQ, this really didn't work for us. Greater flexibility on this would have provided better evaluation.'* (Project entry, End Fund Project and Evaluation Report)

This again points to misunderstanding or miscommunication, because from the Programme's perspective there was flexibility in project evaluations. Projects were encouraged to design their own evaluations and use tools they felt were most suitable for them, but with a requirement also to incorporate the specified tools where feasible. The situation may have been exacerbated by turnover in Project staff.

6.31 One approach that might create a more integrated and connected approach to monitoring and evaluation at Programme and Project level would be the early development of a comprehensive Monitoring, Evaluation, Accountability and Learning plan ('MEAL'). This is an approach which is increasingly taken in grant programmes, and especially in the area of international development<sup>48</sup>.

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<sup>47</sup> Consideration could be given to providing a suite of validated tools in future programmes, to cover a wider array of the target beneficiaries, and how this can be used when reporting and sharing learning at Programme level.

<sup>48</sup> See for example Bond: '[Tools and methods for monitoring, evaluation, accountability and learning](#)'. Whilst it is of course perfectly possible to design and implement effective monitoring and evaluation without such a



## Outcomes for participants

*Did the HAF increase physical health and mental wellbeing?*

- 6.32 Despite the challenges with the overall quality of the quantitative physical activity and wellbeing data<sup>49</sup>, on a project-by-project basis, it is possible to make an assessment of whether Projects supported improved physical health and well-being through an analysis of Projects' individual evaluation reports and end of fund reports. Projects used a wide range of methods to explore changes in physical activity and well-being, including HAF surveys which they created, gathering informal participant feedback, case studies, partner observations and ongoing organisational monitoring processes.
- 6.33 All 15 Projects on-going in year 4 reported outcomes of improvements in physical health and mental well-being for beneficiaries due to increased activity levels and access to new opportunities. Our assessments of their reports are supported by interviews with Project leads and Case Officer observations.
- 6.34 Projects reported that some of these outcomes were described as life-changing by Project participants, and there is an extensive array of interviews, participant stories, videos, and individual feedback from participants and activity providers to demonstrate this. Some indication of the strength of the impact felt by individual participants can be gained from their comments. For example:

*'Walking with the group... made me feel so much happier and healthier. My stamina is much better, and I can walk more than I did. I'm also noticing more things as I walk than I used to, because we talk about the things we see on our walks; I'm more aware of the trees and beautiful flowers rather than just walking from A to B. Walking's not a chore; it's a joy! I feel happier now as well, being part of the group.'* (Living Streets Cymru End Fund Project & Evaluation Report).

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plan, the comprehensive and systematic nature of them, and their timing, has been found to be very effective by many organisations.

<sup>49</sup> It is very unlikely to ever be appropriate to collate all IPAQ and WEMWBS data and analyse it as a whole, even if it had been high quality, as the contexts, interventions and timescales for each Project were so varied.

*'I wouldn't be coming on these walks if I couldn't talk to anyone. Tell them it's what makes me happy. I'm (elderly) and it's these walks that keep me going.'* (Living Streets Cymru End Fund Project & Evaluation Report).

Participation was reported to help develop confidence, something Projects had actively sought to do:

*'I feel at ease with the whole group and able to discuss anything. I feel part of a team rather than a group...Everyone is listened to in the group and given a chance to discuss the issues. We have all agreed that what is said in group stays in group which gives me confidence to talk openly... To be honest I don't know if I would still be here if it was not for the group. Have had some bad days but the ladies are always there for me. I cannot put in words what this class and [provider name] have done for me and my family.'* (Participant quoted by Tredegar House National Trust in Evaluation Report, May 2022).

6.35 Projects reported examples where the strength of feeling about the Project benefits appears to go far beyond being more physically active. Reflecting on HAF closure one participant commented:

*'You wouldn't just take my medication away, so why would you take this away?'* (Participant quoted by The Outdoor Partnership during interview).

6.36 Project evaluations<sup>50</sup> have highlighted some of the specific health benefits that they assess participants to have gained from taking part in HAF activities. These included:

- Improved cardiovascular health;
- The ability to reduce pain or manage pain;
- Help with Covid-19 recovery and dealing with long Covid;
- Maintaining or increasing mobility, strength and flexibility;
- Fewer concerns about falling, improvements to balance and strength; and,
- Reduced likelihood of needing medical and / or social care interventions.

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<sup>50</sup> These examples are referenced in evaluations undertaken by Bridgend CBC, Women Connect First, Sporting Memories and Action for Elders – there are many similar examples across Projects.

*Wider outcomes for participants and communities*

- 6.37 The Projects reported that although monitoring and evaluation has been a key part of the HAF, they were only able to harvest a small amount of its overall impact. It is challenging to measure the indirect impacts of the Projects on things like influencing thinking around physical activity and well-being among participants, partners and the wider community. Projects felt they had (and continue to have) a positive impact that goes beyond the key indicators of physical activity and mental health. These include: (i) social benefits, reduced loneliness and isolation; (ii) increasing knowledge and awareness about the importance of active, healthy lifestyles; and (iii) enhancing access to and engagement with nature and the outdoor environment.

*Social benefits, reduced loneliness and isolation*

- 6.38 The activities offered by Projects provided opportunities for participants to socialise and (partly influenced by the context of the pandemic) this was highlighted by Projects as one of the main benefits of the HAF. They reported these benefits were often at the forefront of participants' minds. Participants reportedly often had lunch or refreshments together after activity sessions, arranged to meet as a group independently, met new friends, had contact with other new parents, joined other activities and clubs and set up WhatsApp groups and similar to stay in touch.
- 6.39 Project leads often actively encouraged project delivery staff to support these outcomes, by staying on after sessions for informal discussion and chat (also helping the workforce understand the target audience and form relationships).

*'[The project] fostered a degree of independent and autonomous organisation on the part of some participants, with the use of digital communications technology (WhatsApp). This has had a positive effect on increasing digital literacy among participants, some of whom were not familiar with this technology before becoming involved in the project'* (Living Streets Cymru End Fund Project & Evaluation report).

While this was not formally measured as a part of project outcomes, there was sufficient qualitative evidence to suggest that this was one of its impacts.

6.40 Creating and supporting social connection was a key enabler for success, and Projects noted that this part of the project was more easily sustained with limited funding. Indicative quotes include:

*'Since the pandemic, there has been a rapid rise in demand for social offerings; older people want safe, accessible opportunities to meet with others, develop social connections and reduce their isolation. With the support of the HAF grant, we adapted delivery to meet the urgent and complex needs of vulnerable older people across Wales, providing the constant, trusted support that they desperately needed. We developed our community-based projects in Swansea, Neath Port Talbot, Powys, Vale of Glamorgan, and Torfaen, building on our weekly groups and introducing 'Social Hubs' to combat the effects of cost-of-living crisis, increasing our social offer, and combatting the epidemic of loneliness through relationship-centred support.'* (Balanced Lives for Care Homes End Fund Project & Evaluation Report).

*'Just over two-thirds (66.4%) of participants reported seeing more people socially because of their involvement with the programme... social interaction was by some way the single most frequently mentioned outcome by participants when asked to name the most important change the project had caused for them.'* (Be Active RCT Programme Final Evaluation April 2019 – March 2023).

*Increased knowledge and awareness of the importance and benefits of active healthy lifestyles*

6.41 Projects such as the Family Engagement Project, Sporting Memories, Healthy Body Healthy Mind, Super Agers and Welsh Active Early Years Project reported that benefits of HAF Projects also extended to family members, carers, support workers and volunteers. This included helping to develop knowledge about the benefits of physical activity on mental health and wellbeing and the inspiration to get involved. One Project reported that parental understanding of physical literacy improved:

*'I knew children needed to be active but I didn't know why they did certain things and why they were important... I have used the ideas as there were lots of new things to do together and I liked that there was a reason to the activities. I had*

*never seen some of the activities before. We now spend more time outside as he is enjoying climbing & running.*' (Participant quoted in Welsh Active Early Years Programme End Fund Project & Evaluation Report).

- 6.42 Project activities also made the connections with healthy eating and good nutrition. For example, in their evaluation report, Women Connect First reported that 90 per cent of their participants felt they had more knowledge of the benefits of physical exercise, eating healthily and learning more about their health because of the Project. Projects such as Growing Together reported raising awareness and understanding of food growing, and the importance of healthy eating and active lifestyles among both the partners and the beneficiaries. As a result of the impact they recorded, a number of the Registered Social Landlords involved in the Project indicated that they would be incorporating these considerations into their programs/activities moving forward.
- 6.43 Projects also took steps to help raise awareness of the opportunities to be active that already exist, benefiting whole communities. The Healthy and Active Newport Project collated a range of information relating to sports, arts and well-being clubs and events. This has been added to an online community hub managed by Newport Live which allows individuals to find opportunities to take part in independently.

*Enhancing use and appreciation of the natural and outdoor environment*

- 6.44 HAF Programme actors spoke of the connection with well-being, the outdoors and use of the natural environment of Wales. Most Projects had an outdoor element to them and those which were entirely based outdoors were particularly valuable during the pandemic.
- 6.45 Research has established the additional benefits of being active in nature and green spaces<sup>51</sup> and HAF Projects added to this body of evidence and encouraged greater involvement in the outdoors.
- 6.46 Actif Woods Wales ran online Agored courses named Fantastic Food, that highlighted how to start cooking from scratch using foraged ingredients. Surveys of

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<sup>51</sup> Twohig-Bennett and Jones, (2018).

their participants found that 79 per cent felt more motivated to get involved in other nature-based activities following the sessions and 94 per cent said that they would continue to use woodlands or natural green spaces to aid their health and well-being longer term.

6.47 An evaluation by Bangor University for the Babi Actif Project reported:

*'qualitative data obtained from focus groups strongly supported that being outdoors provided sensory benefits and facilitated babies' sleep... focus groups revealed that Babi Actif sessions helped parents with practical parenting skills and educated parents on outdoor opportunities available around their home. Social support further facilitated parents to get outdoors with their babies, both within Babi Actif sessions and longer term within their newly formed social networks.'* (Evaluation of the Babi Actif Project, Jamie Macdonald PhD, Bangor University).

6.48 An external evaluation of BeActive RCT, another Project that sought to help participants increase their access to green spaces, found that 67.7 per cent of participants sampled felt better able to access green or other outdoor spaces because of their involvement with the Project. One participant explained:

*'It has opened up a new dimension to my life by introducing me to new friends and visiting areas I was unaware of. I am also more knowledgeable with regards to birds, flora and fauna.'* (BeActive RCT Programme Final Evaluation April 2019 – March 2023).

Another spoke of how the Project encouraged them to get involved in improving the local area and ultimately leading to work:

*'I was keen to get involved with the community and make friends, and a lover of the outdoors and nature – however I lived in big cities (before). It was a culture shock but I quickly grew to adore the green spaces surrounding the village. When (activity provider) organized a litter pick I jumped at the chance because the trash on the trails really bothered me and I don't want my children to feel that kind of behaviour is acceptable. This first pick led me to join environmental action groups online, I bought a picker and I've collected hundreds of bags since. I am quite*

*devoted and have pulled together a team of activists here in the village for big projects and moral support. This volunteer work led me to a position working as well! So I owe BeActive and (activity provider) a lot.'* (BeActive RCT Programme Final Evaluation April 2019 – March 2023).

6.49 Growing Together has created growing sites as community assets that can endure beyond the life of the Project. These provide a green space that can be used to support mental and physical well-being of residents and school children in the respective areas, and potentially be used for ongoing intergenerational activities. The Project also increased awareness among partners of the potential value of developing these types of green spaces in their respective sites. They reported that Registered Social Landlords with whom they worked highlighted the positive impact the spaces had on residents, which has made them consider making further improvements to outdoor spaces. One partner also rented a large allotment plot to provide further growing space for their residents.

6.50 One of many more examples of the benefits of being in nature and the outdoors and what this can lead to beyond the activity itself came from a participant in Coed Lleol (Small Woods Wales) who reported:

*'Being part of Coed Lleol has really built my confidence in a positive way. Doing this type of thing takes me out of my house and outdoors, I have seen an improvement in my mental health. My confidence has grown so that I am able to volunteer and seek out other opportunities too. Coed Lleol lit a spark in me and made me want to find out more about the natural world and ecology – when I was volunteering people would ask me questions and I didn't always know the answers, so this spurred me on to find out more. So, this year, I have signed up for a course in (the subject). I don't know where it will take me longer-term, but I am really interested in learning more about forestry and habitats, so hopefully, it will open some new doors for me. I would never have dreamt of (this) if it wasn't for being part of these groups. I'm looking forward to seeing where this takes me.'* (Project participant, cited in Coed Lleol (Small Woods Wales) Participant Stories 2022-23 report).

6.51 Participant feedback reported by Projects shows very clearly how multiple outcomes of Project activity work together and reinforce each other – physical, mental and social benefits are all connected. Partly as a result of the effects of the pandemic on mental health and social isolation, Projects observed the need for an increasing focus on a Project design that supports mental health and well-being and social benefits as opposed to an emphasis on being active - whether that is in their messaging, or the added services and signposting that takes place to help people with their individual needs.

### **Project organisation outcomes**

6.52 The forward looking theory of change model includes intermediate outcomes. Of relevance to organisational outcomes are the following intentions for the HAF: *Projects can flex to unforeseen circumstances; and Projects learn for the future and workforce capacity and skills grow.*

6.53 Workforce development: This was a key outcome cited by Project staff and Case officers. Skills were developed in a number of ways: in the use of technology and improved digital literacy, in undertaking evaluation, in gaining a better understanding of beneficiaries, and through working collaboratively and developing strong partnerships with a wide range of organisations.

6.54 Understanding beneficiaries: The experience of implementing the HAF fostered learning among Project staff about working with target groups and both reinforced existing knowledge and gained new insight. Projects gained from the experience of working with groups they had not previously engaged with intensely in the past. This could be a new demographic group or a new location.

6.55 Those Projects who were working with the same target audience observed very different participant motivations, barriers and successes when running their activities in different geographical locations, even within the same local authority. There were different challenges when working in more deprived communities and dealing with rural deprivation, but more generally, Project staff saw an increase in demand for services because of the cost of living. For example, StreetGames highlighted how potential participants were prevented from accessing opportunities



due to the incidental costs of taking part, such as having the right clothes, equipment or transport options for themselves or their children. Sports lockers, libraries and kit rooms emerged as a result in several local authorities, both as a result of the HAF and more generally.

- 6.56 Projects learned about motivations and constraints for different groups, and how as a result of the pandemic the negative impact on a whole range of vulnerable groups meant they had to focus more on confidence development and supporting mental health needs. For some, this was a new skill set.
- 6.57 Digital literacy: The pandemic was a catalyst to improve digital capacity and the use of technology to enhance the ways that Project activity could be delivered. This required upskilling in some smaller partner organisations - for both staff and volunteers - and the provision of devices for staff to work on remotely. One of the effects was to enable Projects to have more frequent contact with the workforce. There were clearly benefits from the necessity of getting such systems in place to communicate online, although this was not always a preferred way of working.
- 6.58 Monitoring and evaluation processes: In some Projects, the HAF enabled lead organisation staff and delivery partners to develop skills and experience in the process of monitoring, evaluating and understanding impact. For some, this was a new role and responsibility and was often challenging. A Programme level interviewee observed that Project staff had increased their ability to manage project evaluations, gained experience in handling data, and may be better placed to evaluate their own work than before, especially due to the rigorous reporting requirements. The evaluation requirements of the HAF have resulted in a large body of evidence that Projects feel they can use to make the case for mainstreaming HAF activities within their organisational practice and / or use to apply for other grants.
- 6.59 Wider workforce and volunteer skills: Newport Live identified that the volunteer pathways created through the Healthy and Active Newport Project contributed to fulfilling the aims of Newport's Local Wellbeing Plan 2018-23. They also highlighted benefits for teachers: 90 per cent of teaching staff reported feeling more confident to deliver physical activity sessions. They also reported an influence on school sports

culture, for example encouraging schools to be open for school holiday periods as venues. One school implemented an enrichment programme modelled on the HAF approach. Other Projects supporting practitioner training and development and physical literacy included Welsh Active Early Years Programme and Play Ambassadors, the latter which saw young people and community members gaining employment either with play teams or community play provision. At project end, Play Wales reported that 17 ambassadors gained employment.

- 6.60 Enhanced partnership working: Projects developed strong relationships with partners (see Chapter 5) in part assisted in the early stages by the need to react to the pandemic and the way in which online working removed time/travel/cost barriers. These partnerships, in the main, became well established and partners continue to work together. The numbers of partners that Projects worked with runs to the hundreds and there are several examples of Projects being integrated into wider networks and agendas such as the Welsh Network of Healthy School Schemes, and being represented on the Cross-Party Group for the Outdoor Activity Sector, which provides a further opportunity to share learning.
- 6.61 Economic and employment opportunities: In some cases, Project reach was extended, and there are at least three examples of lead organisations having their services commissioned by new partners and across a wider geographical area due to HAF successes. There are also examples of Project leads who were in roles created by the HAF gaining permanent positions to continue to embed HAF work (BeActive RCT, Babi Actif, Balanced Lives for Care Homes, Play Ambassadors).
- 6.62 Some Projects reported economic benefits for partners and providers linked to the HAF. For example, Women Connect First reported:

*'The Project has already had an impact in providing employment and continued opportunities to its staff, instructors and tutors (all ethnic minority women from local communities) during the pandemic and in general during the first three years of the Project. During the pandemic we transferred our services online and gave opportunities to our tutors and instructors to continue providing classes and have an income as most of them are freelancers. Also we were able to use the skills of our volunteers and local members from the community and provide them*

*with volunteering and sessional work opportunities during the pandemic.*

*Additionally, the use of local community spaces and venues in delivering Project activities has helped in financial sustainability of some of our local venues.'*

*(Healthy Body Healthy Mind End Fund Project & Evaluation Report).*

- 6.63 Strong, resilient organisations: Project organisations overwhelmingly demonstrated their ability to flex to unexpected circumstances, and examples of how that took place are set out in Chapter 4. A quote from HAPPy highlighted this:

*'That each organisation can adapt to challenges, particularly in one of (if not the most) challenging external contexts that any of the organisations have worked in. It has shown the National Trust team at Tredegar House that we do have the ability, confidence, and resources to host future groups taking part in physical work in the parkland, including people who may be facing mental health challenges, or are not as experienced working in the outdoors, and may need additional support to feel confident undertaking such work.'* (HAPPy End Fund Project & Evaluation Report).

- 6.64 Some Projects credited HAF with strengthening their governance systems and policies. One spoke of a comprehensive overhaul of processes in the organisation due to HAF learning and risk management, such as contracts, forms, insurance, and standards for activity providers. Others reported learning about the staff resources required to undertake administration and coordination of activities, as well as delivering activities and doing engagement work, and how this played out when developing balanced job descriptions, roles and responsibilities. These resources and skills are now a useful legacy 'beyond' HAF and will continue to be used by organisations and their beneficiaries.
- 6.65 Finally, there was evidence of social benefits from two Projects which commissioned an analysis of the Social Return on Investment (SROI). The Outdoor Partnership collaborated with Cardiff and Bangor Universities to provide a comprehensive analysis of the social return on investment of Opening Doors to the Outdoors. The evaluations reported that in 2021, £5.81 to £6.44 of social value was generated for every £1 spent on participants, and in 2022, between £4.90 to £5.36

of social value was generated<sup>52</sup>. Bridgend County Borough Council commissioned a SROI analysis of the Super Agers programme<sup>53</sup>. This found that one year's work of the Super Agers programme creates around £960,000 of social value per year, of which £500,000 is directly attributable to the Super Agers. The investment in the programme is around £130,000 meaning that for every £1 invested, around £3.80 of social value is created. The analysis was based on an average of the cost of the first three years of investment. It was hoped that having invested in establishing the Super Agers programme, the county councils involved could continue to run the programme at a lower cost without reducing reach or quality. This would mean the SROI ratio could increase significantly.

### **Learning points**

- 6.66 At Programme level, there has been a significant amount of learning gained about a) the workforce resources, skills and experience required to collect good quality quantitative data and b) the effects of standard tools on a good or poor participant experience, and the future appropriateness of recommending standard tools such as IPAQ and WEMWBS for use with underrepresented groups. The issue here is not the intrinsic value of what are well validated tools, but the challenges of recommending standard tools to provide consistent data across such varied projects working with diverse groups.
- 6.67 Programme level flexibility about monitoring tools and requirements for Projects as challenges emerged was welcomed. Although guidance was provided from the outset, this did not always reach the individuals who were responsible for assessing outcomes and the extended range of activity providers who needed to incorporate data collection processes into their sessions. Staff turnover added to the problem. Greater emphasis on discussion and agreement of appropriate monitoring and evaluation processes with Projects at the early stages of their inception would be beneficial.

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<sup>52</sup> Makanjuola, Hartfiel, Cuthbert, Lynch & Edwards, (2022)

<sup>53</sup> SROI Evaluation of the Super Agers Programme, Bridgend, Rhondda Cynon Taf and Merthyr Tydfil County Borough Councils. Envoy Partnership conducted an evaluation of the Super Agers project between November 2020 and December 2022.

- 6.68 A number of Projects suggested that a more collaborative approach to the design of monitoring and evaluation may have been beneficial. Projects also suggested that developing monitoring and evaluation processes in collaboration with other Projects working with similar target groups or geographical areas could have been a more effective use of resources. Whilst Projects had the opportunity to be proactive and do so, it did not happen in the absence of direct support in that regard.
- 6.69 The health and well-being outcomes recorded by Project evaluations and supported by interviews with Programme level actors and Case Officers are substantial and very positive. The evidence suggests that a focus on well-being became even more important during the four years, with increased demand for support such as that offered by Projects. Project organisations demonstrated great resilience and leadership during the four years of HAF, responding to challenges that included the pandemic and the cost of living crisis. An extensive range of learning has been gathered that continues to inform their working practices more generally and interventions have had a real and positive impact on the health and wellbeing people living in Wales.

## 7. The Overall Programme Assessment

- 7.1 The evaluation reported here is a Programme level evaluation. As indicated earlier, the Projects conducted their own project-level evaluations. So, the value-added by our evaluation is the insights focused at Programme level.
- 7.2 In reality, of course, the success of a Programme such as the HAF depends significantly on how the Projects themselves have performed, because they generate both the immediate value for participants and create much of any sustained value both for participants and in terms of organisational and policy learning. That is the reason for the assessment in Chapter 6 which focused on what was achieved across Projects, and the factors that enabled those achievements.
- 7.3 In evaluating the Programme as a whole, there are then two further major dimensions to consider. First, **what hopes and expectations did senior Programme-level actors have** of the HAF, and how far were they realised? Secondly, **what part did the Programme-level play in enabling the Projects' success?** In relation to this latter dimension, we will be looking back at the Programme's adopted Theory of Change. (All quotes in this Chapter are from Programme actors, including members of the Project Board and its subgroups or Case Officers, unless stated otherwise.)
- Did the HAF achieve Programme-level actors' hopes and expectations?**
- 7.4 Whilst not by any means the only yardstick, one very important measure of the success of a programme is whether in practice it met the hopes and expectations of those entrusted with the stewardship of its development and delivery. The key actors came to the HAF with a range of perspectives. As a collaborative Programme, objectives had to be melded together, and that involved compromise and acceptance that the HAF would not give effect wholly to the aspirations of any one of the national partners.
- 7.5 Programme-level actors shared the key aspiration that the HAF would give practical effect to the policy commitments of the Welsh Government. In that regard they were successful, as we have documented in Chapter 2.

Beyond that, their hopes and expectations reflected the responsibilities and perspectives of their organisations. Among Welsh Government actors, *‘the Programme is a good opportunity for seed funding to try things out in relation to well-being as well as physical activity. Whilst not a unique programme it is reasonably unusual. There are interventions on tobacco, and we support the healthy weight journey with similar funding, and also in Healthy Weight: Healthy Wales there is an intervention around families but that is rather more prescriptive.’* [On the other hand, they were] *‘sceptical about the relatively short-term funding and never expected that the Programme would change the world. I am instinctively sceptical about short-term funding. Especially in the third sector, people leave and have to look for new jobs, unless they get concrete commitments. But it could help to be a blueprint for others, the question then being how do we do that?’*

7.6 Among Sport Wales actors,

*‘the Programme was a new way of collaborative working to tackle wicked issues, and engage excluded communities and those who are hard to reach. We wanted a blueprint for future initiatives as well as benefit for individuals from the Programme.’* [They also saw it as a success. In terms of outcomes whilst] *‘I am cautious because I am not close enough to it, there are a number of Projects of interest and value, and clear learnings. Many of these are not new but they have reinforced previous learning and the legacy ought in part to be about using these results to build into future programmes, although there are no discernible echoes over that learning that I am aware of. The Programme has also given opportunities to Sport Wales to contribute to other major Welsh Government programmes such as ‘Healthy Weight: Healthy Wales’, and initiatives in relation to mental health.’*

*‘[The] Programme related strongly to Sport Wales’ vision for sport for everyone, and the determination to get the non-active more active. It was also an opportunity to learn about how people’s needs and motivations differ according to a number of factors. So we took the view that let us learn how to engage with these target audiences, and explore new partners and new methods of*

*engagement. Those objectives were shared by the national partners – the data is there to show that a wider approach is needed to tackle the non-active, and there was a collective drive to explore that.'*

7.7 Those aspirations and expectations were met at least in part:

*'For us, tackling inequality is the key so anything that we can glean is potentially valuable. The HAF has given us learning mainly through reinforcement of lessons that we had started to see from other activity including this programme the 60 plus programme, C4A [Calls 4 Action], families and children, and so on. They all helped to make the case for physical activity and physical literacy, a case we are always trying to make at 'Healthy Weight: Healthy Wales'. Health is a strategic object for Sport Wales so these programmes matter, especially the key examples of change which they are capable of producing.'*

7.8 From a public health perspective, limitations were recognised:

*'the Programme model is not consistent with population level change. I have always had a concern about the short-term funding and so have been sceptical about its likely success. It may not have been right to use funding in this way but the decision had already been made at a political level so we made the best of it. We could have done many other things with the money depending on the target audience, by making a change to a policy or an aspect of the environment and selecting a key area such as obesity or tobacco, perhaps calorie labelling or school interventions to support physical activity.'*

*[the] 'Programme was perhaps at the less effective end of the spectrum and this was partly about the context of Covid. We expected to see benefit for individuals but got less of this given the context.'*

7.9 On the other hand,

*'It was innovative and experimental and this was a good thing and there was a change in approach around partnership working both at national and local level which has not been achieved since at the national level. It was also a way of gathering more learning about the small grant process. There is a lot of it done but there is less understanding about whether it is a good thing and why.'*



*[We] 'hoped to get a very varied range of applications to get a sense of different physical and mental health interventions. We had everything from dry ski slope applications to green gardening, not just 8 week programmes in a leisure centre. The partnership working at a local level opened up lots of future working – the HAF process 'positively forced' working with other stakeholders and learning from each other. So future potential collaborations are some of the biggest benefits. We were never going to see change at a population level. But neither were we able to measure all the local benefits that have emerged with the monitoring tools that were used. More strategically, it has been an interesting process for the partners to work together, a good live experiment. At the level of the Delivery and Evaluation Groups it worked really well and could be replicated.'*

*As to the outcomes, whilst] 'we did not have the best data, lots of the Projects had good success, and changes in their ways of working. The case studies and the qualitative data really impress and are powerful.'* Another saw the HAF in terms that it *'has definitely been a more thorough approach than other initiatives I have been involved with.'*

7.10 As to outcomes,

*'the theory behind partnership working and that intent worked – in setting up a fund, and having clear roles and respect. I do believe that the HAF has made a difference, as seen in the end of fund evaluations, the community assets, the legacy that has been left, and the sustainability – aspects of HAF Projects have been maintained in some sort of way such as training and building the capacity of volunteers. Overall it has been a massive success in relation to both physical and mental wellbeing.'*

7.11 The success has been broad based.

*'The Projects that stand out are the stories and personal things about the beneficiaries. I am impressed with the numbers involved, the number of sessions organised, and of volunteers. The personal stories show Projects helping with being lonely, and with loss, and creating benefits for older people. There are potentially scalable Projects, including some which make the most of the assets*

*of Wales and the natural environment. A significant number of them have clearly been very successful. I have also seen improvement in workforce skills and capacities during the Programme, and the ability to manage Projects and expectations. It shows in the end of fund reports. They are also better placed to evaluate their own work than before.'*

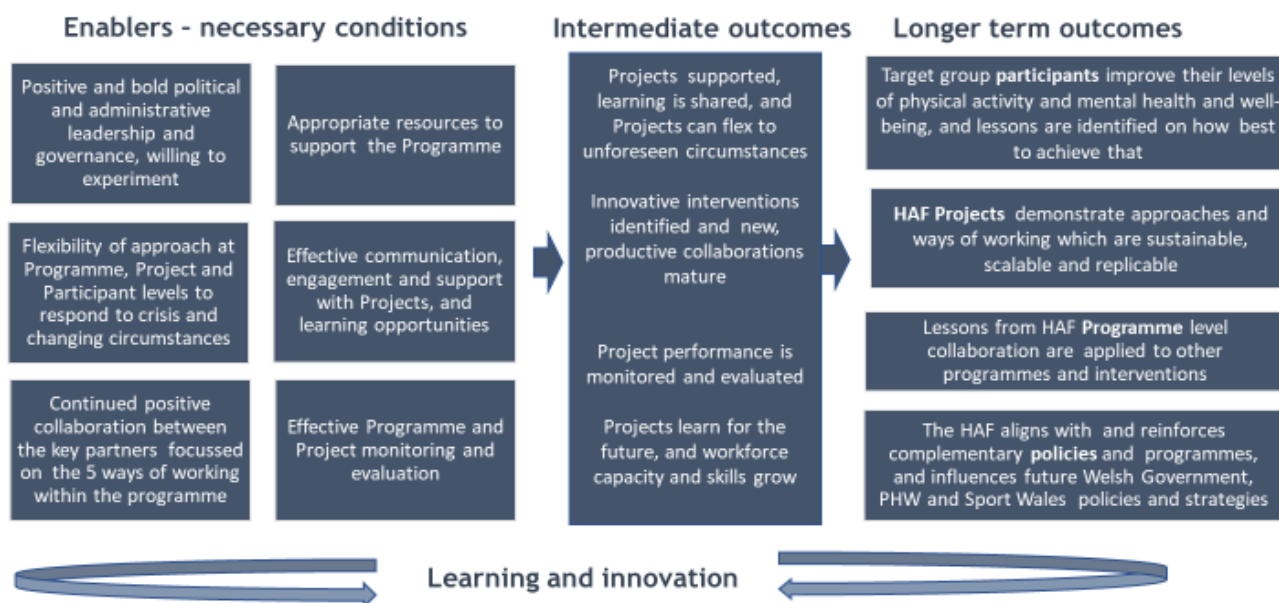
- 7.12 The more senior actors focused mostly on the partnership and collaboration which they experienced – and contributed to – in the early days of design and implementation, and were satisfied in that area of achievement. They were less clear about the impacts and success of the Projects. Less senior actors, especially Case Officers who were closer to Projects, had much more to say about Project level outcomes for participants, and the value of the learning generated through the Projects. As we will see later, however, this did not translate into a clear picture at Project Board level of what had been achieved on the ground. As one actor put it, *'there was something of a disconnect between those who had this more senior view and were interested in the more strategic issues but did not have access or arrange to get access to enough of what was going on at project level to inform whether that strategic view had been realised or not.'*

### **The Programme level's part in the HAF's success**

- 7.13 To explore the specific part played by programme-level activity and interventions, we re-visited the Theory of Change going forward as adopted by the HAF Project Board.

**Figure 7.1 HAF Theory of Change Going Forward During the Programme**

## HAF Theory of Change Going Forward During the Programme



7.14 This was developed by the Project Board at the point when the Projects were already up and running, and when the enabling processes put in place at the outset had got the Programme to and through the design and launch phases. It had three major dimensions. First, enablers were still needed so that the Projects could perform as best they could. All of those listed in the Theory of Change – leadership, flexibility; resources; effective communication, engagement and support with Projects; monitoring and evaluation; and continued collaboration between the national partners – were seen as having a part to play in creating and maintaining the ongoing conditions for success. They were, for example, very strongly in evidence when the Project Board was able to secure both significant flexibility and additional funding to enable the Projects to respond to Covid-19 as well as they did. For the Projects, the outcomes were also potentially that they were supported, and learning was achieved and shared, as set out in the middle column.

7.15 However, those enablers were also geared to the longer-term outcomes:

- Target participants enjoyed more physical activity and well-being;

- Projects demonstrated scalability, replicability, and sustainability;
- Collaboration lessons were applied to other interventions; and,
- Learning from the HAF informed policies, programmes and strategies.

7.16 Major aspects of the enablers and of the intermediate and longer-term outcomes have been addressed in previous Chapters. Here we marshal the programme level aspects under three headings:

- Programme and Project Management – we look at this in the broadest sense to include the programme enablers and especially the role of the Project Board, and also the Programme Management structure and the Case Officer role;
- Learning and Policy Transfer – we look at this at programme level, including learning pathways, the role of key policy transfer actors, and connections to the wider policy environment; and,
- Ways of Working set out in the Well-being of Future Generations (Wales) Act 2015 – we focus here on how the Programme level exhibited these, and how they were incorporated in particular aspects of the HAF Programme, and refer to the extent to which they were instilled by the Programme into the Projects.

In relation to all three we project what happened in the HAF Programme into relevant literature and research.

### **Programme and Project Management**

7.17 Whilst great programme content is a necessary condition of success, it is not in itself a sufficient condition. Much depends on how effectively a project or programme is managed, and successive UK and Welsh governments have taken steps to strengthen delivery which has traditionally been an under-developed area of public service administration<sup>54</sup>.

7.18 Project and programme management operates according to a series of well-rehearsed principles and practices, including such matters as the project structure,

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<sup>54</sup> Perhaps the best well known of these is Sir Michael Barber (2007), 'Instruction to Deliver', Politico's Publishing, London

reporting lines, and roles and responsibilities. The UK Government's Functional Standard on Project Delivery, for example, sets out a series of principles<sup>55</sup>:

Those engaged in project delivery shall ensure:

1. delivery objectives are aligned to government policy and organisational objectives;
2. continuing business justification to confirm benefits can be realised and risks managed within the organisation's risk appetite, and that unjustified work is terminated;
3. governance and management frameworks, and controls are proportionate and appropriate to the work and the level of prevailing risk;
4. accountabilities and responsibilities are defined, mutually consistent and traceable across all levels of management;
5. experience and lessons are captured, shared and used to promote future performance improvement;
6. work is appropriately defined, planned, monitored and controlled, quality is actively managed to maximise the likelihood of success and defined working methodologies are tailored for use accordingly;
7. outcomes and enabling outputs meet the need and are validated by stakeholders;
8. work is undertaken in multidisciplinary teams and is assigned to people who have the required capability and capacity;
9. the transition of capabilities to operations is planned and programme or project closure managed, with ongoing operational responsibilities agreed and accepted; and,
10. public service codes of conduct and ethics and those of associated professions are upheld.

7.19 Although we did not undertake a full evaluation of the HAF Programme against these principles, they have informed our assessment. Some were self-evidently relevant, such as the way in which key actors ensured that the HAF was fully

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<sup>55</sup> Government Functional Standard: GovS 002 Project Delivery Issued by HM Government 15<sup>th</sup> July 2021. This document draws heavily from PRINCE 2 Project Management principles and practices, p7.

aligned to Welsh Government policy and objectives. Others, such as capturing the learning, were aspirations of the HAF Programme but realised to a lesser degree.

7.20 The HAF Programme gave effect to these principles in many of its principal aspects, including its architecture, operating model, and key processes. It was overseen by a Project Board led by a Senior Responsible Officer (indeed, co-SROs in the early stages) and managed its own work through a Delivery Group and an Evaluation Group, all with an appropriate range of participants in terms of seniority, organisational location, and roles. Such arrangements were relatively routine, save in this case that they also reflected the unusual partnership and collaboration which was the HAF hallmark. Membership was drawn from all four of the sponsoring bodies, reflecting their continued stake in the Programme. The Case Officers appointed to liaise with the Projects were also drawn from across the organisations.

7.21 In this section we will focus on two major areas of Programme Management which the evidence demonstrates to have presented most challenges. These are the changing role of the Project Board, and the role of the Case Officers and linkages between the Programme and Project levels.

7.22 The Project Board: The HAF Project Board was constituted within an explicit purpose and governance structure. The membership suited the collaboration which underpinned the HAF and the objectives which it was hoped the HAF would achieve. It functioned appropriately in the early days of the Programme when a group of senior officials from across the partners worked closely and intensively on the design and launch of the Programme. There were three major challenges to its continued effective operation thereafter:

- The intrinsic nature of national government administration and its associated people management, coupled with the consequences of Covid-19;
- The absence of a clear Project/Programme Manager/Director role; and,
- The absence of flexible arrangements aligned to the Programme life cycle.

7.23 In terms of senior staff turnover and time, it is normal for senior officials to move between posts on a fairly regular basis and this had an impact on the oversight of HAF. In addition, once the initial over-riding priority to get the HAF up and running

had passed, officials' focus shifted to other priorities. In addition, Welsh Government and Public Health Wales officials had to devote much of their attention to crisis management of the pandemic. This affected both Project Board membership and its frequency of meetings. By 2022 and 2023 there was, in effect, only one meeting a year of the Project Board. Importantly, several of officials did maintain their involvement and commitment throughout and provided important organisational and collective memory. New members also added new energy and impetus. However, this did not overcome the problems caused by difficulties in getting people together to hold more regular Project Board and subgroup meetings.

7.24 The Board members recognised this.

*'Project Board started well, with lots of buy in, and met regularly. Then with Covid it became more and more difficult. There were lots of cancellations, and people didn't turn up. How to improve that is difficult. The end bit is not as glamorous, but it is equally important. You have to be committed for the whole thing. When the Project Board did meet, they were very good. Underneath the Project Board the Evaluation Group struggled for representation at one stage, partly through staff turnover. The Delivery Group worked well, and a Delivery Board could have been a helpful go between to link the Evaluation Group and the Project Board. Representation on the Project Board was good in first year but then for everyday working, a sub-board could have been good. For example, representation for the last two years has involved deputies attending rather than senior staff. You need to be able to translate the Project Board higher level thinking into actual work, so a lot more was needed at Delivery Group level.'*

*'As years have gone by the Delivery Group has also gone – it was a task and finish group'*

*[The] 'Project Board certainly throttled back and there was a turnover of project priorities', and 'the Project Board frequency and impact has shifted because they couldn't get people together.'*

*[Once the HAF had been established the] 'Project Board was passive rather than active, and reactive. Early on it was much more active and proactive.'*

7.25 This definitely diminished Programme-level actors' understanding of what was being achieved by the HAF and the learning it was generating:

*'Early on there was a willingness to take risks and to do different things and try new methods and tackle new target groups, and so there was innovation and policy. And some is going on, for example in the early years field. But because the Project Board is not meeting I haven't really been in touch with these developments.'*

7.26 Nevertheless, the Project Board continued to provide direction and decisions when required:

*'For my purposes, the Project Board worked fine – if Projects sent a question through, and it went to the Project Board with a proposal on how to resolve it they went with what was suggested. They were very supportive in their direction and speed.'*

7.27 The question clearly arises as to what might have been done differently to help maintain greater involvement by the Project Board. This was perhaps impossible under Covid-19, but the Project Board made a choice to be less actively involved prior to the pandemic.

7.28 One possibility would have been to redefine the Project Board's role and function once the HAF had been launched. As one actor explained:

*'As to the Project Board, after the sigh of relief of the design and launch stage, the effort fell away and the momentum dipped, and then this was compounded by the pandemic. They never quite re-established the level of interest and organisation in the programme and by then there was a quite different cohort of people. This happened not because the people involved had necessarily disappeared but they were inevitably preoccupied with new and more pressing demands which is the constant cycle of government. Perhaps we should have re-thought the role - the various stages of a project are to start it, deliver, and close. What mechanisms are fit for purpose at each stage? Perhaps it is necessary to move consciously to a new phase of a governance model to suit each of those.'*



7.29 One of the other options might have been the appointment of an official to a role of ‘Project Manager or Director’<sup>56</sup>. As set out in the UK Government’s Functional Standard, their role would have been different to that of the Senior Responsible Officer who *‘is accountable to the sponsoring body for a programme or project meeting its objectives, delivering the required outcomes and realising the required benefits. The senior responsible owner owns the business case and is accountable for governance.’*<sup>57</sup>

7.30 The programme/project manager would be *‘accountable to the senior responsible owner for establishing the governance and management framework and for the day-to-day management of a programme/project, to deliver the outputs and desired outcomes, and realise the required benefits. The programme/project manager is accountable to the senior responsible owner for establishing the governance framework and for the day-to-day management of a programme/project, to deliver the outputs and desired outcomes, and realise the required benefits, including, but not limited to:*

- *ensuring the solution is designed and business case and plans prepared;*
- *defining the approach, accountabilities, work scope and targets for the team;*
- *monitoring, forecasting and reporting overall progress against the plan;*
- *resolving risks and issues and controlling change;*
- *delivering the required outputs and outcomes;*
- *monitoring and managing supplier performance; and,*
- *engaging and communicating with stakeholders’*<sup>58</sup>.

7.31 Having both roles was seen as a potential benefit by a number of actors.

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<sup>56</sup> In practice, this role was partly carried out by one of the senior programme level actors. However, what is raised here is the possibility of a specific assigned role, with a role description, and dedicated time for it, as suggested in the UK Government’s Functional Standard: GovS 002 Project Delivery Issued by HM Government 15<sup>th</sup> July 2021.

<sup>57</sup> *Ibid.* p.47

<sup>58</sup> *Ibid.* p.47

*'Given the distinct throttling back a part-time director would have helped...Over the long-term, energy and focus drops, and perhaps one needs a team to do this and another team to do that, including a team to make policy connections across government.'*

*'In terms of having a potential director role, beyond a senior responsible officer which does not give the full focus, this would have been a benefit. It also would have been a way of coordinating the Case Officers and focusing on learning from them.'*

The problem, as seen by one actor, was that in the absence of such a role there was *'interest without ownership'*.

- 7.32 There are a range of possibilities to reflect both the different roles that might be performed (i.e. programme manager vs. programme director), and also the different stages in the life cycle of a funding programme (e.g. development, implementation, closure). As one actor put it:

*'I do not think any more could have been done given the limitations of the fund. I can see the virtue of maybe having a different team take over the implementation from the design and launch phase, not a new team completely but perhaps a new purposing. We did not work out how the HAF stays on track, and the pandemic may well have distracted them from that. I can see the potential benefit of having a 'director' role although there would then be a danger of weakening the collective benefits and effort. So that may be a matter of timing. It would be someone whose job it is to take responsibility at a more operational level below the senior responsible officer. We did not have that person at the implementation stage. It might be a project manager rather than a director, someone who would hold the ring.'*

- 7.33 **Case Officers and the Project Board/Project Connection:** As seen above, a number of actors identified a gap between the Project Board and the Projects. The HAF design provided for a Case Officer from the Welsh Government, Public Health Wales or Sport Wales to be appointed for each Project. They had a key liaison and communication role and were close to what was happening on the ground. One

Programme actor observed: *'There was a big gap between the Board and the Projects, and the Case Officers were much closer to what was going on. There were some learning events with very mixed formats and more engagement would have been valuable.'* Another *'would have liked to have known more about what was taking place at project level but this was the Case Officer role.'*

7.34 The gap worsened as time went on.

*'We were not good at communicating what we (the Project Board) were doing and how. We could have had a quarterly newsletter, for example. We addressed this by learning sessions at one point and did attempt to bring people together but it was tricky. We had envisaged Projects sharing – people weren't as keen to get involved as much as we would have liked. The closure of the fund and how Projects might be feeling is also an issue. We had wanted to have a conference, involve Health Boards and showcase the work, and we had considered paying for videos of the Projects and sharing them. Circumstances outside of our control means this hasn't happened. We are disappointed that they couldn't do this and it is difficult to communicate that to the Projects.'*

7.35 The Case Officer role was not an easy one and personnel changes added further complication:

*'Ongoing communication with Projects could have been improved. The high turnover of Case Officers could have been considered, and we should have had a deputy system and not just one person as a point of contact. It was tricky to find replacement Case Officers.'*

*'Support varied across Case Officers. Some had experience of this type of work and could help on the project management side or the evaluation side. The experience of the Case Officer dictated the support that Projects got. There was not a standard level of support. Even though the role was supposed to be light touch we did put in quite a bit of time. From an evaluation perspective all had access to the same amount of support and there was standard guidance document produced. They also held evaluation clinics. There were a high number of emails and calls which could be quite basic from 'how do I do a focus group' to*

*information about the conversion table for IPAQ. Some Projects had lots of one to ones, more than originally intended. Projects that got PhD students or commissioned evaluations required less support. Half a day a week was allocated for (some of the) COs – support came in pockets though not regular.'*

*'There was an impact in terms of a change of personnel and planning for the staffing resource that was needed. There were changes at the Case Officer level even before the pandemic. There was a role description for the Case Officers but that may not have been prominent in their consciousness. There was no mechanism for bringing them all together and the Case Officers were not equally equipped to perform the role.'*

7.36 Projects also varied in their needs:

*'Some Projects needed hand holding and some were quite challenging in their expectations. In terms of support from Case Officers it was difficult, because we didn't appreciate the intensity of resources required. Going forward, I would have had 2 or 3 Case Officers per Project to share the load, or a pool or bank of Case Officers to draw on.'*

7.37 There were actions that might have been taken to even out the variation, strengthen the capacity of the Case Officers overall, enable them to learn more from each other, and be a more effective bridge between the Projects and the Project Board.

### **Learning and Policy Transfer**

7.38 Learning and the associated policy transfer to other interventions and policy domains has been central to the HAF throughout. Although the headline objective was to improve the physical and mental health of key target groups by enabling active lifestyles, the architects of the HAF were keenly aware that its scale and scope meant that the HAF could not produce population level change. Its principal long-term benefit would, therefore, be the learning it generated which could inform other interventions. As the Welsh Government made clear in commissioning this evaluation, a key objective was not only to *'identify and capture lessons from stand-out projects and assess whether they could be scaled up at the national level'* but also and for all elements of the evaluation, *'to identify lessons that can be learned*

*and make recommendations for later phases of the HAF and other funds or funding mechanisms in the future, including their evaluation.'*

7.39 There has been growing interest in policy learning and there is now a significant literature on the conditions that enable it<sup>59</sup>. Policy makers have intrinsically limited knowledge about precisely what will work best in the particular contexts in which they operate. Policy learning is seen as an important means of reducing that uncertainty by reviewing and updating their assumptions about which policy options will work best in light of experience. In its broadest sense policy learning is therefore defined as updating of policy beliefs and preferences<sup>60</sup> and it encompasses those processes 'by which governments increase their intelligence and sophistication and in this manner enhance the effectiveness of their actions'<sup>61</sup>. Also relevant to the HAF are the closely related concepts of 'policy transfer' and 'policy diffusion', which is defined as a process in which decision-makers in one institutional setting learn from the policy decisions made in another<sup>62</sup>. Policies may be transferred between localities, different sectors or different jurisdictions, and mechanisms for encouraging policy transfer include voluntary imitation, coercion or competition.

7.40 The aim of policy learning is to understand what works, why, where and for whom? Key questions include:

1. Policy appraisal - Did we choose the best policy option(s)?
2. Policy implementation - Did we employ the right policy instrument(s)?
3. Benefit realisation - Did we achieve the intended impacts?
4. Transferability – Could the policy be successfully adapted/adopted in other contexts?

7.41 Sometimes policy makers have a good idea of what works and policy learning therefore involves rolling out tried and tested solutions. In other cases where policy

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<sup>59</sup> See, for example, Bennett and Howlett (1992); Dunlop and Radaelli (2013); Freeman (2006); Grin and Loeber (2007); Parsons (1995)

<sup>60</sup> Dunlop and Radaelli (2013)

<sup>61</sup> Etheridge and short (1983: 77-78)

<sup>62</sup> Dolowitz and Marsh (2000)

makers do not know what works, we need experimentation to test out approaches and find out what is effective<sup>63</sup>. This is where evaluation has a key role to play by providing up-to-date, relevant information on what is being achieved and how and building the capacity to take action to modify policy design and implementation in the light of such information<sup>64</sup>. Experimentation can take place at different scales, ranging the project level to whole systems, and some researchers have made the case for ‘the experimenting society’ which ‘would be active, preferring innovation to inaction; it would be an evolutionary, learning society and an honest society, committed to reality testing, to self-criticism and to avoiding self- deception; it would be non-dogmatic, accountable, decentralized and scientific.’<sup>65</sup>

7.42 The HAF is in tune with this way of thinking. It was explicitly designed to create policy learning about ‘what works’ through ‘prototyping’<sup>66</sup> – taking a concept and discovering how it can be adapted and finetuned to work better. This is not only about reducing uncertainty for policy makers, but also helps to open up new opportunities and ways of thinking and working which help broaden the scope of future policy options, identify new actors to engage in policy development and implementation, and test and reinforce existing and emergent themes in current interventions.

7.43 Effective policy learning/transfer/diffusion needs to take account of both ‘hard’ components such as policy problems, policy objectives and policy instrument and ‘soft’ aspects such as ideas, ideologies and political values. The extent of policy learning depends in part on policy actors’ cognitive and absorptive capacity. Faced with the multiple, often urgent, demands and little time and ‘headspace’, policy makers often have limited ‘learning capacity’. So, intermediaries – such as evaluators and policy experts - frequently play a role in capturing and sharing policy learning<sup>67</sup>. The existence of groups of like-minded professionals who share broadly similar values, objectives and beliefs, also creates promising conditions for

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<sup>63</sup> Campbell and Russo (1999)

<sup>64</sup> Dunsire (1986)

<sup>65</sup> Oakley (2000) p. 320

<sup>66</sup> Sanderson (2002)

<sup>67</sup> Deutsch (1963)

generating and disseminating policy learning<sup>68</sup>. And the 'advocacy coalition framework', which is used widely in policy studies, describes how groups of actors operating in 'policy sub-systems' work together to arrive at 'relatively enduring alterations of..... behavioural intentions that result from experience'<sup>69</sup>.

7.44 Conversely, the fragmentation of policy communities and a lack of policy capacity are significant and frequent obstacles to policy learning. It is therefore important to cultivate organisational cultures which are conducive to reflection and deliberation, through the creation of forums for discussion and deliberation among policy actors and cultures which allow them 'permission' to reflect and question<sup>70</sup>.

7.45 These insights drawn from the literature on policy learning and transfer, provide the context for our assessment of how the HAF has worked so far in generating and disseminating learning, and what might need doing in future to fully exploit the learning asset which the HAF represents. The material is presented around three key conclusions from our evaluation:

- The HAF generated useful learning at programme level. It is uncertain whether that is yet being systematically transferred/used, although this evaluation may help to achieve that in part. The HAF also generated useful lessons at project level, some reinforced existing knowledge but some created new insights.
- There is evidence from some interviewees of some continued interest in the HAF at senior levels, and some threads of influence deriving from the HAF can be detected. However, many senior actors we interviewed did not see these, even those close to the HAF. They must therefore be regarded as limited in their reach not only beyond the HAF but also amongst HAF Programme Level actors.
- There does not appear to be a systematic pathway for policy transfer and learning at either programme or project level. There is no obvious champion with the spare capacity to create one. The Project Board is not connected to

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<sup>68</sup> Hass and Haas (1995); Dunlop (2013)

<sup>69</sup> Sabatier and Jenkins-Smith (1993: 42)

<sup>70</sup> Dunlop and Radaelli (2018)

Project learning, as reflected in the absence of a close down event and of any systematic harvesting and sharing within the HAF Programme Management system of Project lessons.

7.46 Useful Learning: Many of the programme level actors interviewed identified positive learning which had emerged from the HAF. One highlighted the multiple connections of the HAF, for example both to ‘Healthy Weight: Health Wales’, and to social prescribing where there has been significant recent policy development.

They reported that although:

*‘a lot of the programme is not particularly novel it is capable of demonstrating innovation in the sense that it shows that these ways of working can be more durable and resilient. But they did demonstrate innovation during Covid, and there was also interest to be had from the very broad types of projects in terms of age, geography, families, mental health, and different kinds of intervention.’*

7.47 There were also lessons about sustainability: *‘The question of sustainability was one of particular interest. There seems to be significant impact with some longevity in some individual communities.’*

7.48 An important innovation was the *‘willingness to fail and giving people the opportunity to try’*. The partnership at national level was also novel: *‘Working with the national partners was new and the Wales Physical Activity Partnership was being developed to involve those partners.’* Another sector actor believed that the choice of Projects had been innovative. That *‘was a key stage in innovation’*. They also highlighted innovative *‘collaboration with other bodies. Whilst I need confirmation through the project level evaluations, I have a good sense that the collaboration aspect was working well at project level as well.’* They also saw a connection between the HAF and the innovative area of social prescribing – this was an area of innovation which was an explicit sphere of activity in a number of the Projects.

7.49 A further area of positive policy impact was in the linkage between health and sport:

*‘It was Ministerially driven to get sport and health together, underpinned by the ‘Healthy Weight: Healthy Wales’ strategy, and by explicit Chief Executive level*



*connections. Sport Wales were able to help shape the 'Healthy Weight: Healthy Wales' strategy, and there has been good feedback on that contribution from health officials. So the HAF helped to break that new ground.'*

- 7.50 For some, HAF broke the ground, but did not fully prepare it to continue to bear fruit. One Programme actor observed that the

*'Programme was not at the size and scale that I was hoping for. For example, across the nation young people's activity levels are static, and shifting that will need a significant intervention. Are we looking sufficiently long term at the health of the nation? We are moving there, but slowly. It is slow because Covid was an issue and some of the strongest advocates for the HAF were pulled away. Sport Wales moved into crisis mode and there was limited funding for new initiatives. The Programme provided short-term funding when what was needed was longer-term funding. In terms of whether there is a way to get there now, there are bits and pieces of work going on, but on Projects rather than a more general approach. There were efforts [to] create a physical activity group, but it withered.'*

- 7.51 There was also scepticism about whether the learning will be picked up in the future:

*'There is enthusiasm to do things in the air now, but this doesn't engage the longer-term. We need a budget for health promotion on a quite different scale. There is a significant risk that it will remain piecemeal.'*

- 7.52 One senior actor believed the HAF had generated important lessons which had not yet been assimilated: *'The small grant process seemed to be effective but it has not yet been summarised and reflected on sufficiently'*. But another reported: *'We learned about the capabilities needed for small organisations, and competence in collecting data. This was big learning. We now have a better appreciation of the time and difficulties and resources required to collect data, and the expectation of form completion by participants. Some Projects can demonstrate a difference made already.'*

- 7.53 Some actors doubted that the HAF had so far provided lessons about how to achieve sustainability.

*'As anticipated there has been very little sustainability. In terms of policy learning I do not know about that as yet. The innovation is in the partnership at programme level, with some innovation at project level in terms of content. There were really three types of Project. There were those who were doing something elsewhere and wanted to apply that to a different geography. There were those who were carrying on or extended what they were already doing. A few responded to a specific need.'*

- 7.54 The 'policy' impacts were individual and personal, as well as organisational. For one, the HAF was a

*'massive learning experience. Personally, I have developed loads on things like stakeholder management, things that are hard to learn from a course. It has also set the foundation for future joint working. The impact of HAF on organisational policies has included an initiative which.....involves Public Health Wales, Natural Resources Wales, Sport Wales, and Welsh Government so this is an example of further joint working. Also, at least some of the Projects are scalable in their simplicity and replicability.'*

- 7.55 As noted above, social prescribing was referred to by a number of actors as a potential or actual area of policy transfer from the HAF.

*It 'has helped increase the evidence base on social prescribing. We will look at the outcomes because there is massive learning to be had on how Projects handled it. Social prescribing has come from the ground up, and what we are doing will be a best practice thing, not rules of how to do it. So the practice from HAF Projects is very valuable.'*

- 7.56 Many Project Board members were cautious in their assessment of Project level learning because they did not feel close enough to be confident in their judgements. Instead, they relied on Case Officer views, and these were generally positive: *'Case officer feedback was that there were good local interventions through the projects which were mostly positive, useful and worthwhile, often based on good partnerships.'* There was also potential scalability:

*'There are some examples of where the programme led to improvements in physical activity but I only know those that we were dealing with. I cannot speak for the collective. The Project Board did not have that summary of benefits. One Project has shared what they think is a model in relation to schools. They did not get the opportunity to present this to the Project Board. The Welsh Government initially said they would run activities connected to 'Healthy Weight: Healthy Wales', so that when physical activity was the theme at the forums then the Projects from the HAF would be invited. But I do not think this has happened.'*

7.57 It is clear from the interviews we conducted that one fundamental and necessary (but not sufficient) condition for policy transfer and learning was clearly met by the HAF. Programme level actors believed strongly that there was learning to be had, albeit that they emphasised different aspects. There was agreement that learning content was available and senior actors were positive about its wider relevance, even though some did not believe it had been fully utilised as yet.

7.58 Using the Learning: The question then is how the learning from the HAF might be best applied. For one senior actor:

*'the question is what influence it could have on pathways to greater physical and mental well-being, and how the lessons can be learned. Potentially there is interest in the Grants Centre of Excellence. Sustainability is also very important, for example if Projects provide seed funding, or does the work just stop when the funding ends? Ministers have been aware and..... I will sometimes take a piece of learning (to key meetings). I look particularly to the independent and robust evaluations at programme and project level to facilitate the application of the learning.'*

7.59 Others felt that the learning lacked a clear pathway:

*'In terms of the influence of the Programme on other programmes there are no threads that I can think of going from it to elsewhere. It should at some point when they have captured the learning. The question will be whether it will be shared. The learning will be in the hands of key actors and it is not clear where the dissemination strategy is. The active sharing of learning, or the lack of it, is a*

*weakness in the system. It could be done. There is no obvious destination for the policy lessons. The change narrative did not survive the change of personnel within the Programme. The issue is how to keep that going because the thread stops. This may be a wider lesson.'*

7.60 This idea of a missed opportunity for wider learning was a persistent theme.

*'It feels like we have not closed down the Programme properly. Ideally we would bring people back for a conversation and discuss and reflect on the lessons and think about what could be done and with who. This could include special advisers, the Grants Centre of Excellence, and the Head of Policy, especially if it was related to the use of resources.'*

7.61 A senior actor expressed a similar sense of lost opportunity linked to the role of the Project Board.

*'In the final year there was a shift in the capacity of Welsh Government and in years 3 to 4 the Project Board had less momentum, less meetings, and less energy. I pushed for more visibility for the Projects to the Project Board through an event but that did not happen. Potentially one might look for links to other structures and processes, not looking for funding necessarily but trying to find ways of lodging lessons that might be then applied by others. However there does not seem to be the capacity in Welsh Government to do this. There was an offer to combine a learning event with another event, but that did not happen. The question is where are the key points of learning, and what are we doing with those? If we don't distil the learning from the Programme we have missed an opportunity. I am not sure that that learning is anywhere. I have not seen it, and I am not aware of any mechanism for it to be collected. The Project leads very much wanted to meet the Project Board and the Project Board should have met them and allowed them to be listened to and to acknowledge their efforts. In terms of the key points, I do not know what they are because I am not close enough to the Projects. But there will be stuff from Projects, especially around Covid. Where is the learning from the learning events? There is good stuff in evaluations potentially, but where is it? Maybe the Case Officers would have it. There was no process to harvest and summarise the learning and what must be*

*done and not done. In terms of whether the lessons from the Programme have influenced other programmes, this may happen at project level where they have used their learning, but not for the Programme as a whole on an intervention basis.'*

- 7.62 There is strong evidence that the learning pathways and structures have not been in place to enable learning from the HAF to be transmitted elsewhere. The key actors were not aware of any plans to enable that to happen, save what might flow from this evaluation and, at Project level, from the Project evaluations. The actors themselves could see that there was learning to be had, but in large measure it remained at what has been termed the 'tacit' level. It has not been codified and crystallised and made available<sup>71</sup>.

### **Ways of Working**

- 7.63 The HAF partners were keen to have evaluated the extent to which the HAF exhibited the five 'ways of working' at the heart of the Well-being of Future Generations (Wales) Act 2015. The HAF was one of the interventions assessed by the Wales Audit Office in their early evaluation of the implementation of the Act<sup>72</sup>.
- 7.64 One of the questions posed to us by Welsh Government was the extent to which the HAF has succeeded in instilling the 'five ways of working' across the Projects. In this respect there is little to add to the analysis we provided in the Report on the HAF Process evaluation. That showed that between 75 per cent and 80 per cent of applicants felt that the HAF process had enabled all five of the ways of working to be realised. The analysis conducted by the WAO also demonstrated that the Programme did instil collaboration and involvement with and in the Projects through the HAF process as described in Chapter 2, and through the application requirements, and also applied 'integration' through the objectives and criteria against which Projects were assessed. In terms of 'long term' and 'prevention', both were aspirations of the HAF and of the Projects, but the Programme itself provided only relatively short-term funding. The value of the HAF in terms of long-term

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<sup>71</sup> See J. Hartley and L. Rashman (2018).

<sup>72</sup> Implementing the Well-being of Future Generations Act – Welsh Government, Document reference: 1536A2019-20, Issued November 2019

benefits at the participant, organisational and policy levels depend partly on the sustainability of the Projects, something that will be assessed in 2024. Issues of prevention could only become clear in the long-term, and if the Programme had been geared more explicitly to that objective. As one of the programme level interviewees put it below, *'short-term funding is not really consistent with the ways of working'*.

7.65 In terms of how the ways of working operated during and towards the end of the HAF, the Interim Reports and the assessment of the themes arising from the Projects' reporting provided insights into their continuing relevance for the HAF at Programme level.

7.66 At Programme level, it was clear that the five ways of working were a reference point rather than a direct guide to action. For one, the *'five ways of working are still a good lens for reviewing activity. The enthusiasm is still there and there has been shared learning and continued interest.'* For another, however, they were more significant in the early days of the HAF:

*'The Project Board, and the Evaluation and Delivery Groups were all well connected but again this was about the people and their relationships. The Audit Office and the well-being goals and five ways of working were important to us. There was turnover of staff and this had an effect on the HAF, especially around Covid, which lost some momentum and buy in. People's interests waned and the project methodology has not happened in reality.'*

7.67 They identified factors which meant that the ways of working did not feature as strongly as the HAF evolved:

*'I still have a sense of achievement and pride about what we did in creating the HAF. However people are now, if anything, more entrenched and less collaborative, and I wish that there was more. Remote working has made it much harder, people move on, they do not know the background or other people. They used to know each other much better. The personalities at the time were important and we quickly developed friendships which I still value, and we still keep in touch. I look fondly back, and was engrossed in it and all the work we did,*

*and the lessons learned were so important. There has been nothing really like it since, although there has been lots of cross government action and policies, and those plans have gone fine, but they do not necessarily join up. Getting people together has worked in raising awareness but often foundered on the clarity of Ministerial responsibilities, with having a Minister for sport but physical activity in with Health.'*

7.68 A senior actor in another organisation also echoed the contrast between the early days and what came later.

*'There was a strong collective understanding amongst the key players. The extensive collaboration was a new departure and the Audit Office looked at it...it was not quite a pooled budget but it was a joint budget. We obviously had worked with government and with the other partners, but the tripartite nature of the Programme was new. The catalyst was the manifesto commitments and also the review of Sport Wales and the recommendations of that towards collaboration, and the strengthening of the relationship between sport and health in government, and between Public Health Wales and Sport Wales. We worked well in the early days and this was visible in the distribution of work, in the strategic leadership at senior levels, and in the common understanding and appetite....'*

7.69 However, more recently this same actor has *'been trying to get the network collaboration issue on to the continuing agenda, and there are some positive green shoots in the regions, but not because of the HAF.'*

7.70 Another senior programme actor also celebrated the HAF collaboration:

*'The partnership approach was good learning and we gained from having different perspectives and in coming together, so the partnership aspect at national level was fulfilled relatively early at programme level. The partnership notion influenced me and my thinking and the value of collaboration was evident. In terms of the ways of working it should have been about prevention, it clearly was not long term, there was integration and there was involvement. Short term funding is not really consistent with the five ways of working.'*

7.71 They reported that:

*'We're good at piloting without knowing how the pilot would be mainstreamed, so there is a permanent cycle of pilots. If there is success the question is whose job it is to make it all mainstream. There would always be major financial implications and in the real world could things be replicated given the financial constraints? We talked of sustainability but not really about scalability. We did not ask the question and that might have led to more action in terms of planning to make use of the lessons and the pilot learning. The underlying issue is that of course we're not short of good ideas to spend money on.'*

7.72 Another noted that:

*'In terms of ways of working there was collaboration at both programme and project levels. In terms of long-term and prevention the Programme was trying to make the case. In terms of sustainability I would query how much effort has gone into embedding the Projects into a sustainable future. We have remained committed to the Case Officer role and Projects have stayed on our radar. When (the new SRO) came in meetings were more punchy and there was more energy, but he has not been able to keep the Project Board together and it has effectively disappeared..... the focus has shifted, and the mood music has been one of doing the best we can.'*

7.73 This observation goes to the heart of an assessment of the ways of working at HAF Programme level. The principal vehicle for giving effect to the ways of working at that level was the Project Board. That was where collaborative thinking about the potential value of Project level lessons for long-term policy and behaviour change, and preventative action, could have been focussed, and where further consideration of implications for the well-being goals of other public bodies ('integration') could have found expression. Of course, that would have required not only a much more active Project Board, but also stronger and richer connectivity and involvement with the Projects, especially those where potentially scalable and replicable lessons were emerging.



7.74 There are positives which have developed at programme level, including building on the collaboration which has endured. One senior programme level actor saw possibilities in a variety of directions:

*'Externally the Regional Partnership Boards and the Public Service Boards have some funding and the Minister has taken an interest in these, and this includes social prescribing. These are vehicles for potential lessons. The Programme was very collaborative space, for example the Case Officers, and people stayed the course, including those at Sport Wales and Public Health Wales. It was tricky to get Board meetings but collaboration remained strong and that seems to have fostered some strong relationships, for example with Natural Resources Wales. There is an initiative in schools where Natural Resources Wales, Sport Wales, and the Welsh Government are collaborating further.'*

7.75 Another specific benefit from the ways of working was the re-positioning of Sport Wales: *'The HAF gave Sport Wales a profile and credibility especially with health colleagues. It broke new ground. It showed that Sport Wales teams have skills around practical interventions...'*

7.76 It is also important to recognise that the position in terms of both exhibiting the ways of working and also generating value from them, is not yet closed. This report and the associated events we've discussed provide impetus and an opportunity to look again at potential actions to generate further value and action. There are Project level evaluations with significant learning, as well as this evaluation. The opportunity to apply the ways of working to those materials by the national partners could lead to greater value being created from the HAF and multiplied through its application elsewhere.

## **8. Conclusion and Lessons Learned**

8.1 Our final Chapter considers the overall conclusions and lessons learned from the evaluation. We provide an overview, followed by a summary of the key concluding points raised in each of the report chapters, and our recommendations.

### **Overall Conclusions and Lessons**

8.2 By most measures the HAF was a success. It worked effectively as a Programme, founded on an unusual/unique collaboration and budget sharing between two Government Departments, Public Health Wales, and Sport Wales. It was set up in exemplary fashion and created a strong and clear framework for inviting and approving bids, and provided an operating framework using innovative arrangements including designated Case Officers. It also demonstrated flexibility and good sense in supporting adjustments to funding and delivery models when the pandemic hit. Only one Project of the 17 ended prematurely, and that was for unavoidable Covid-related reasons.

8.3 A wide geographical target audience and activity range was delivered by the HAF funded Projects, almost all of which delivered more than they were grant aided to deliver. Projects demonstrated a wide range of learning in key areas including how to engage a range of hard to reach groups, and what tools and methods to use in achieving effective delivery. They demonstrated remarkable flexibility and resilience under Covid-19 conditions, and many turned the challenge to their advantage through digital and remote delivery methods, and careful post-pandemic re-engagement.

8.4 The principal area for strengthening the value of the HAF was in harvesting, codifying and amplifying both the Programme and the Project level learning, and ensuring that the asset was exploited effectively. Whilst there is still opportunity, and intention, to use the learning, it did not happen sufficiently during the Programme. That it did not was partly a result of pandemic conditions, but also structural weaknesses in governance and leadership, which were independent of the commitment and talent which many senior actors in the partner organisations brought to the HAF.

8.5 The HAF Team effectively put in place most of the necessary enablers for a successful Programme. It also succeeded in producing the intermediate outcomes of having a good range of effective Projects.

8.6 In terms of the potential longer term outcomes:

- Target participants did enjoy more physical activity and well-being. It is not yet clear whether that was achieved on a value for money basis in all cases;
- Some Projects demonstrated scalability, replicability, and sustainability, but this evidence has not been harnessed in any systematic way, and questions around sustainability will not be answered until the supplementary evaluation is completed in 2024;
- Collaboration lessons were substantial, but were only applied to other interventions through the individual capacities and experiences of those directly involved; and,
- Learning from the HAF has not yet materially informed wider policies, programmes and strategies.

### **HAF Process**

8.7 The HAF process was pretty much exemplary in terms of:

- a) Collaboration and budget sharing between public entities concerned with health and physical activity;
- b) Building a policy partnership;
- c) Programme design and preparation;
- d) Consultation and engagement with potential applicants;
- e) Translating policy into practice;
- f) Setting a strong framework for the Projects;
- g) Achieving a wide range of interesting and different Projects; and,
- h) Giving effect to equality considerations.

- 8.8 The national partners created effective governance, and they put into practice the conditions for developing an effective Programme in terms of accountability, strategy and approach, guidance and assessment, and resources and support, albeit this latter at some cost to the actors involved.
- 8.9 They did not look ahead sufficiently to ensure that the focus, the learning and the ways of working would be harvested and fed into appropriate channels and bodies, and these aspects did not survive the very negative impact of the pandemic. A comprehensive MEAL Plan could have helped to fill potential gaps in the overall evaluation of the Projects/Programme.

### **HAF Theory of Change**

- 8.10 The evaluation of the HAF Theory of Change generated a number of insights and lessons. It revealed that the right combination of people, with clarity of purpose, may not need an explicit theory of change to succeed in creating an effective intervention, although such a theory would almost certainly strengthen clarity in linking Programme process to Programme purpose. Indeed, this work identified that there was a clear implicit underlying 'logic model' and theory of change, and that highlighted the key enablers which underpinned the successful design and launch of the HAF.
- 8.11 A theory of change for a HAF-type programme need not be uni-causal and rigid, and was not in this case. It is also capable of change and adaptation as circumstances change.
- 8.12 It can help to identify what the most important factors have been in successful programme design and implementation – in this case highlighting the critical role of collaboration, which was a significant and positive feature of the programme. Ministerial priorities provided a strong impetus within a new partnership to collaborate, for example in budget sharing across Welsh Government and even with external partners.
- 8.13 An explicit theory of change in a HAF-type programme, with multiple Projects funded on an application-response basis, can provide a clear and relatively simple test of alignment between the logic of intervention at project and programme level.

- 8.14 The development of the forward looking HAF Theory of Change opened up options in programme management and leadership, which could be light touch, or more proactive and engaging, even within the same theory of change. This can have significant implications for whether key Programme objectives are achieved.

### **Delivery and Covid-19 Adaptations**

- 8.15 Despite the huge challenges of the pandemic, there is a legacy of learning and innovations in response to Covid-19, and many positive outcomes in the adaptations made by Projects and supported by the Programme. Several Projects retained changes they made due to their success and innovations. These included:
- 8.16 A blended approach to delivery: A mix of online and face to face opportunities extended the reach of Projects and helped remove geographical and confidence barriers for some individuals – including those who were shielding.
- 8.17 Training adaptations: Adapting existing training modules to online delivery made some provision more efficient and/or cost-effective.
- 8.18 Increased digital literacy: The pandemic was a catalyst to improving digital capacity and upskilling, and it enabled more frequent contact between some organisations. This has been one positive result of virtual meetings, removing time, travel and cost barriers of face to face meetings.
- 8.19 A legacy of virtual resources: Resources developed as part of early delivery remain as a bank of accessible opportunities that are a useful legacy beyond the pandemic. However, there was widespread agreement among Projects and partners that face to face approaches are preferable for relationship building, informal consultation, one to one informal support for individuals experiencing barriers, and ad hoc generation and sharing of ideas.
- 8.20 More partnership working and stronger relationships: The pandemic stimulated stronger partnership working and strengthened some relationships. The significance of community engagement to enable Projects to access their target groups emerged as a major theme.

- 8.21 Learning has been gained about effective partnership working, including the need for upfront collaborative planning between partners, learning through different models of delivery, the importance of sound governance and stakeholder management, and the staff resources required to do this effectively. Some Projects have embedded this in their organisational processes.
- 8.22 Investing time in consultation and coproduction adds value: Projects who did this reported deeper understanding of participants within their target audience. They applied this insight to provide bespoke and tailored approaches to meet different needs.
- 8.23 Sufficient resources are required: Some Projects found that their initial allocation of resources to assessing impact was insufficient, and they had to re-assign or seek additional resources to be able to do it properly.
- 8.24 Monitoring methods: Tailoring monitoring and data collection methods to the particular activities and characteristics of each Project was critical. The standardised methods only suited some participants and activities. Supplementary methods were chosen by Projects in collaboration with their own appointed evaluators and/or internal advisers, and as a result varied widely.

### **Key Themes**

- 8.25 Key themes explored as part of the programme evaluation throughout the main delivery years were (i) community engagement; (ii) sustainability and (iii) the learning process.

#### *(i) Community Engagement*

- 8.26 The needs and demands of communities were sometimes very different from what Projects had envisaged at the outset, especially under Covid-19. Community engagement work was key to adjusting successfully and the ability to offer flexible, tailored approaches. The flexibility offered at Programme level supported Projects to adapt their plans. Projects achieved this in a variety of ways including:

- Introducing a range of communication options for beneficiaries;
- Making things accessible and low cost;

- Adapting existing activities for different abilities;
- Ensuring as far as possible that sessions were delivered by Welsh speakers as well as English in predominantly Welsh speaking areas; and
- Embedding activities within target communities, fostering a sense of autonomy and ownership among the groups.

8.27 The learning includes:

8.28 Effective partnership working: This is central to community engagement and implementing community centred approaches to planning, delivering and evaluating projects<sup>73</sup>. This was reflected in many HAF Projects. Having the right partners was key to finding out what is needed and breaking down barriers to participation in HAF activities.

8.29 Involve partners and participants in the planning phases: Importantly, the HAF has highlighted the significance of developing relationships as early as possible, to provide an effective foundation for delivery and to help shape the kinds and modalities of activities and engagement offered by the project. This was particularly important when providers targeted groups they had not previously worked closely with.

8.30 Stronger Community Leadership: Covid-19 stimulated stronger community leadership and promoted greater cross agency working and signposting between services. Community and Project leaders have been more flexible, more open to doing things differently, and more determined, especially in the face of the challenges created by the pandemic.

8.31 A face to face presence: This is preferred for developing trust and providing opportunities for one to one conversations with new/prospective participants 'aside' from the group sessions. Having an on-the-ground presence in local communities through trusted partners is crucial for engagement with new target beneficiaries, especially when working with Black, Asian and Minority Ethnic communities. Those partners can facilitate 'introductions' to potential beneficiaries.

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<sup>73</sup> e.g. Public Health England: A guide to community-centred approaches for health and wellbeing

- 8.32 Appropriate resources allocated for community engagement: Project staff need sufficient capacity to coordinate and develop partnerships with organisations that are connected to participants. It can be resource intensive, especially when developing new relationships and understanding of the mutual benefits and requirements. Some Project roles and responsibilities were adapted over time to ensure they had sufficient capacity to undertake engagement work.
- 8.33 Holistic support: Projects found that as they developed an understanding of participants, local contexts and the community barriers, it was possible to offer more holistic support to communities and individuals through connections and inter-referral.
- 8.34 Social prescribing and referral processes: Projects that had planned to work in partnership with the health sector and develop formal prescribing routes via GP surgeries, had to adapt their approaches because the NHS workforce was focused on responding to the pandemic. Nevertheless, some made significant progress and a wide range of referral systems were developed.

*(ii) Sustainability*

- 8.35 Sustainability was an early and important consideration for the Programme and designed into the process. The tapering of funding in the final year was designed to encourage early consideration of exit routes and Project closure.
- 8.36 Sustainability may not require a project to continue to exist. As the literature indicates, it may be possible to achieve lasting impacts by instilling new norms that become 'mainstream' or to effect irreversible change. These included:
- A legacy of learning to inform policy and practice at strategic level;
  - Sustainability at the participant level, and sustaining activities through volunteer involvement;
  - Mainstreaming/embedding HAF activities in organisations and core work programmes;
  - Gaining additional funding from other sources to continue HAF activities.



8.37 Sustainability issues will be further considered in an extension to the evaluation that will take place in 2024.

*(iii) Project Level Learning Process*

8.38 The Programme has had a focus on the importance of learning throughout. This is supported by the monitoring and evaluation requirements, guidance documents, presentations at application stage and the direction to allocate a proportion of grant resources to support the learning, monitoring and evaluation process.

8.39 Online learning events for Projects were well-received. Projects could also raise any evaluation-related questions with the Evaluation Group. This was welcomed, but it did not support cross Project learning.

8.40 A senior HAF Programme level actor produced a summary paper compiled from Project Highlight Reports. In October 2022, a Project Sustainability Summary Report was also produced.

8.41 Projects considered that HAF would have lasting impact on their own organisations' thinking, policies and practices. Collaboration with partners enabled ongoing learning and reflection on optimal design and implementation to meet the needs of target beneficiaries.

8.42 Projects which established systematic internal learning arrangements benefited from them considerably. Having specific roles and responsibilities for learning was a key enabler. Projects made changes to their operating models as a result of their learning through the HAF.

8.43 Projects' final reports have many examples of how Projects are transferring knowledge more broadly. Projects suggested systemic change is required to ensure more effective learning of the lessons from the HAF, but questioned who can lead the higher level conversation needed to influence policy. Projects have been feeding learning 'upwards' but are unsure where and if this is being made use of. There are no clear mechanisms for sharing learning, but national partners can still address this.

## **Overall Project achievements**

- 8.44 Overall, monitoring data submitted by Projects to Welsh Government shows that 12,000+ people are recorded as having taken part in HAF Projects. Of those who provided demographic data, more females (65.4 per cent) took part than males (34.4 per cent). The majority identified as White and 9 per cent identified as Black, Asian or Minority Ethnic. The majority did not consider themselves to have a disability but 24 per cent did. Overall, 75 per cent per cent lived in a more deprived area. The data collected on physical activity and mental well-being was patchy but 10,000+ survey tools were completed at baseline and 5,000+ follow up forms completed, with respondents sometimes completing more than one tool. Of the Projects using the designated HAF tools:
- Four showed increased physical activity and seven had inconclusive data; and,
  - Five showed increased mental well-being and six had inconclusive data.
- 8.45 All Projects reported outcomes of improvements in physical health and mental well-being for beneficiaries, although it was difficult to quantify this given issues with the quality of the quantitative data collected. Project evaluation reports also highlighted specific health benefits they assessed that participants had gained. Project reports and Project interviews also suggested that HAF had a wider impact beyond the observed increase in physical and mental wellbeing, including (i) social benefits, reduced loneliness and isolation; (ii) increasing knowledge and awareness about the importance of active, healthy lifestyles; and (iii) enhancing access to and engagement with nature and the outdoor environment.
- 8.46 Monitoring and evaluation processes: In some Projects, the HAF enabled lead organisation staff and delivery partners to develop skills and experience in the process of monitoring, evaluating and understanding impact. The evaluation requirements of the HAF have resulted in evidence that Projects and others can use. There has been a significant amount of learning gained about a) the workforce resources, skills and experience required to collect good quality quantitative data and b) the effects of different tools on a wide range of participants and the future appropriateness of recommending standard tools where there is such a diverse

range of organisations and Projects. Some Projects questioned the suitability of the tools in their case and for some categories of beneficiaries. In the context of some of the HAF Projects, some participants found them intrusive, especially the wellbeing statements. Some Projects adapted HAF tools to create participant-friendly versions to suit their audience or used existing organisational tools to measure outcomes. Qualitative approaches were also widely used, as envisaged by the HAF Guidelines.

- 8.47 Programme level flexibility about monitoring tools and requirements for Projects was very positive. Conversely a more collaborative approach to the design of monitoring and evaluation may have been beneficial. A more integrated and connected approach to monitoring and evaluation at Programme and Project level could be the early development of a comprehensive Monitoring, Evaluation, Accountability and Learning plan ('MEAL').
- 8.48 The learning includes:
- 8.49 Understanding beneficiaries: The HAF has fostered learning about working with target groups and has both reinforced existing knowledge and gained new insight. Projects gained from the experience of working with groups they had not previously engaged with.
- 8.50 Wider workforce and volunteer skills: Wider skills were developed in some Projects.
- 8.51 Economic and employment opportunities: There are at least three examples of lead organisations having their services commissioned by new partners and across a wider geographical area due to HAF successes. Some Projects have also reported economic benefits for partners and providers linked to the HAF.
- 8.52 Strong, resilient organisations: Project organisations overwhelmingly demonstrated their ability to flex to unexpected circumstances and adapt their processes to achieve their desired outcomes.
- 8.53 Some Projects credited HAF with strengthening their governance systems and policies.

- 8.54 Two Projects provided evidence of their analyses of the social return on the investments made. The Outdoor Partnership reported £5+ value generated for every £1 spent on participants, and Bridgend County Borough Council found that for every £1 invested, around £3.80 of social value was created.
- 8.55 Based on the quantitative outputs reported in Projects' final evaluation reports, eight of the 16 Projects that continued operating for three or more years met all the numerical targets they had set, and six met most or part of them<sup>74</sup>. In many cases, Projects exceeded at least some of their targets.
- 8.56 Project organisations have demonstrated great resilience and leadership during the four years of HAF, responding to challenges that included the pandemic and the cost of living crisis. An extensive range of learning has been gathered that continues to inform their working practices more generally. Project reports suggest that interventions may have had a real and positive impact on the health and wellbeing of participants.

## **The Programme Overall**

### *Programme-level actors' hopes and expectations*

- 8.57 The key actors came to the HAF with a range of perspectives. They shared the key aspiration that the HAF would give practical effect to the policy commitments of the Welsh Government and were successful in that. Beyond that, their hopes and expectations reflected the responsibilities and perspectives of their organisations. They recognised that the HAF would not produce population level change. It had a more limited but still valuable role in exploring ways to engage hard to reach groups in supporting and improving their physical and mental wellbeing.
- 8.58 The more senior actors focused mostly on the partnership and collaboration which they experienced – and contributed to – in the early days of design and implementation. Less senior actors, especially Case Officers who were closer to Projects, had much more to say about Project level outcomes for participants, and

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<sup>74</sup> One Project did not have numerical targets. Targets were 'met' as revised as a result of funding delays or pandemic conditions.

the value of the learning generated through the Projects. However, this did not translate into a clear picture at Project Board level of what had been achieved on the ground.

#### *Programme and Project Management*

- 8.59 Some key programme and project management principles were evident in the design and delivery of the HAF. The HAF Programme gave effect to these principles in its architecture, operating model, and key processes. Others, such as capturing the learning, were aspirations of the HAF Programme but realised to a lesser degree.
- 8.60 The Project Board: The HAF Project Board was constituted appropriately and functioned well in the early days. Three major challenges to its continued effective operation were (i) the intrinsic nature of national government administration and its associated people management, coupled with (ii) the consequences of Covid-19, (iii) the absence of a clear Project/Programme Manager/Director role, and (iv) the absence of flexible arrangements aligned to the Programme life cycle.
- 8.61 Case Officers and the Project Board/Project Connection: Case Officers had a key liaison and communication role. Their role did not, however, prevent a gap opening up between the Project Board and the Projects, which widened as time went on. Covid-19 also took a direct toll. There were actions that might have been taken to even out the variation, strengthen the capacity of the Case Officers overall, enable them to learn more from each other, and be a more effective bridge between the Projects and the Project Board.

#### *Learning and Policy Transfer*

- 8.62 Learning and the associated policy transfer to other interventions and policy domains was central to the HAF throughout. Its principal long-term benefit was to be the learning it generated which could inform other interventions. Research has identified the key conditions for effective policy learning and transfer.
- 8.63 The HAF generated useful learning at programme level. It is uncertain whether that is yet being systematically transferred/used, although this evaluation may help to

achieve that in part. The HAF also generated useful lessons at Project level, some of which reinforced existing knowledge, but also created new insights.

8.64 Useful Learning: Many of the programme level actors interviewed identified positive learning which had emerged from the HAF. They believed strongly that there was learning to be had, although they emphasised different aspects, and even though some did not believe it had been fully utilised as yet. There is strong evidence that systematic learning pathways and structures have not been in place to enable learning from the HAF to be transmitted elsewhere. The key actors were not aware of any plans to enable that to happen, save what might flow from this evaluation and, at Project level, from the Project evaluations. It remained at the 'tacit' level. It has not been codified and crystallised and made available.

#### *Ways of Working*

8.65 In our assessment, the HAF demonstrated the effective 'ways of working' of the Well-being of Future Generations (Wales) Act 2015:

- Long-term: the HAF was informed by evidence but, while there are plans to monitor the short-term impact on individuals and the sustainability of projects, there are gaps in evaluating the long-term impact;
- Prevention: the HAF aims to prevent ill health by investing in community assets, but the evaluation will not enable a robust assessment of this aim;
- Integration: the Welsh Government is clear about how the HAF supports wider well-being objectives;
- Collaboration: the Welsh Government has demonstrated a commitment to collaboration in all aspects of the fund, including its design, management and evaluation; and,
- Involvement: the Welsh Government has involved appropriate departments, public bodies and community groups and shown commitment to improving its approach to involvement.

8.66 The HAF initially succeeded in instilling the 'five ways of working' across the Projects through the HAF process. The value of the HAF in terms of long-term

benefits at the participant, organisational and policy levels depend partly on the sustainability of the Projects and the application of learning from the HAF to the policy sphere, and issues of prevention would only become clear in the long-term. Short-term funding is not in some respects really consistent with the ways of working.

- 8.67 At Programme level, the five ways of working were an important reference point rather than a direct guide to action, and especially in the formative stages. However, the principal vehicle for continuing to give effect to the ways of working was the Project Board. That would have required not only a much more active Project Board, but also stronger and richer connectivity and involvement with the Projects, especially those where potentially scalable and replicable lessons were emerging.
- 8.68 The position in terms of both exhibiting the ways of working and also generating value from them, is not yet closed. There are Project level evaluations with significant learning to draw on, as well as this evaluation. The opportunity to apply the ways of working to those materials by the national partners could lead to greater value being created from the HAF and multiplied through its application elsewhere.

### **Recommendations**

- 8.69 The Welsh Government should continue to use a HAF style of funding programme where it is testing new approaches and seeking innovative solutions, but only where the key enablers to a successful programme have been put in place, and where such an approach is suited to the intended outcome<sup>75</sup>. These key enablers include effective leadership, governance and accountability; appropriate staff and financial resources both for the programme itself and for programme design and management; a clear programme purpose linked to the funding strategy; a thorough process for attracting and selecting proposals; a clear approach to evaluation through a detailed Monitoring, Evaluation, Accountability and Learning Plan; and, a focussed approach to post-programme sustainability.

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<sup>75</sup> And not, for, example, to population level change.

- 8.70 Such programmes should observe core project and programme management principles, including providing for governance, leadership, and policy transfer during and at the end of the programme as well as on its initiation. This would normally include a designated Project/Programme Manager/Director role, and specific assignment of an actor to be responsible for policy learning and transfer.
- 8.71 Collaboration in such programmes should be encouraged, and should involve partners from across Government and outside of it where appropriate, and budget, risk and governance sharing.
- 8.72 There is a need to have a dynamic communication and engagement strategy as part of the project management. This should relate to all phases and be reviewed as part of the Programme Risk Register to ensure it is being implemented but also remains fit for purpose.
- 8.73 An explicit part of the programme design should be thought-through arrangements for policy learning and transfer, preferably through a comprehensive and integrated Monitoring, Evaluation, Accountability and Learning Plan. There is a need to have at a minimum annually, a learning event at which all parties are invited to network and learn throughout the programme.
- 8.74 Theory of Change approaches should be part of the repertoire of tools available to those designing and implementing such programmes. Particularly where a programme represents a significant collaboration between different organisations and policy domains, working through a mutually agreed theory of change could help set a stronger and clearer framework for both Programme and Project levels.
- 8.75 A Case Officer type role has potentially significant value in maintaining liaison and in connecting Project to Programme levels in both directions. To be effective, the role needs some ongoing attention from Programme leaders to optimise its value, for example in sharing learning between them, and ensuring active feedback of emerging lessons. Case Officers need an agreed role remit especially where they are themselves from different organisations. If they are clear up front what their role is, they are more likely to succeed. They can form an action learning set by meeting regularly to share both their role approach and that of their respective



projects. This would allow trouble shooting and learning on a more regular basis than the larger learning events.

- 8.76 Specific arrangements should be made with respect to the HAF to draw together the learning at both Project and Programme level and ensure that it is brought to the attention of relevant actors at both operational and governance levels.
- 8.77 Specific attention should be given to the value-for-money aspect of project performance, and explicit assessment should be made of the extent to which projects may be scalable, and may either produce cashable savings or provide opportunities for longer term substitution of public expenditure. These are difficult and imprecise calculations to make, but they can be vital lessons for public policy, especially in an era of highly constrained public expenditure.

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## **Annex 1: SUMMARIES OF EACH PROJECT**

This Annex contains one page summaries of the 16 HAF Projects, listed by Project name in alphabetical order as set out in the Table below.

The summaries have been prepared by the UKRCS team, and Projects have had the opportunity to review them in draft. They have generally been prepared according to a standard template (with minor variations, on which see below). The provenance, sources, and status of the content for each template element is explained below. Overall, they have been compiled from Project documentation (including original application materials, highlight and annual reports, data submissions, and reports on evaluations undertaken or commissioned by the Projects themselves), and interviews conducted by the UKRCS team over four years with Project actors and Case Officers. To this extent, the content has been triangulated to the extent that it is all supported by one or more of these sources. All the content is consistent with the insight built up by the UKRCS team over multiple encounters with Project staff and multiple documentary reviews of Project materials. However, we did not have a role in overseeing or quality assuring Project evaluations so the individual data references presented have not been independently verified, and qualitative judgements about impacts and outcomes have that status and no more than that.

**Project Name and Grant Received:** This is the Project name given by the host/sponsor organisation, and the actual grant received, rounded up/down to the nearest 000. These sums differ for many Projects from the original proposed grant, generally because of additional (or reductions in) funds made available by Welsh Government to support extensions or contractions of Projects related to Covid-19 and/or to taper support in the 4<sup>th</sup> year. Projects also often made financial or in-kind top-ups of funding beyond these levels, as indicated in Table 1.1.

**Opening Paragraph:** This states the purpose and geographical location of the Project.

**Project Objective and Deliverables:** This sets out the original objectives as summarised from Project application documentation.

**Actual Delivery and Impact:** This sets out what was actually achieved, subject to the caveat above that we did not have a role in overseeing or quality assuring Project evaluations. Occasionally (e.g. Growing Together), where there are several quantitative targets, both the targets and the actuals are shown in this section. In some cases, we report Project evaluation results. For further information on a Project's evaluation methods and limitations, please contact the Project directly.

**Innovative Aspects and Lessons Learned:** These are principally as described by the Project, but validated to the degree explained earlier.

**Sustainability Intention:** This sets out the Project's aspirations, and actions if any, to support the sustainability of various aspects of the Project and its activities beyond the funding period. Sustainability will also be explored through the follow on evaluation.

<b>HAF Projects</b>
Project name, location, description and lead body
<b>Actif Woods Wales</b> (National): Social Prescribing the Woodland Way. Woodland based activities/training for volunteers, groups and partners: <i>Coed Lleol – Smallwoods</i>
<b>Babi Actif</b> (Northwest Wales): Support to parents to be active outdoors with their babies during the period from conception to age 2: <i>Eryri-Bywiol Cyf</i>
<b>Balanced Lives for Care Homes</b> (Southwest Wales): Improving health and wellbeing through physical and social activity in care homes: <i>Action for Elders Trust</i>
<b>BeActive RCT</b> (Rhondda Cynon Taf): Involving people and communities to improve wellbeing. Multi-agency programme of accessible, person-centred sporting and physical activities in 6 communities with severe health inequalities: <i>Interlink RCT</i>
<b>Cyfeillion Cerdded Cymru</b> (South/Southeast Wales): Intense small walking group activity for older people: <i>Living Streets</i>
<b>Family Engagement Project</b> (South/Southeast Wales & Valleys): Community / partner activities for families in low-income areas: <i>StreetGames UK Ltd</i>
<b>Five Ways to Wellbeing</b> <sup>76</sup> (Flint/Wrexham): Physical Activity to Promote Mental Wellbeing. CAMHS based service to deliver activity for young people with or at risk of mental health difficulty (community service): <i>Betsi Cadwaladr UHB</i>
<b>Growing Together</b> (South/Southeast Wales): Food growing based inter-generational activities: <i>Keep Wales Tidy</i>
<b>HAPPy</b> (Newport): Tredegar House based activities for the young and those in poverty or disadvantage: <i>Tredegar House National Trust</i>
<b>Healthy &amp; Active Newport</b> (Newport): Alliance of statutory and other bodies in Newport to engage in schools and communities: <i>Newport Live</i>
<b>Healthy Body - Healthy Mind</b> (Cardiff): Physical fitness and family activities for Black and Minority Ethnic women and their families: <i>Women Connect First</i>
<b>Opening Doors to the Outdoors</b> (Northwest Wales): Community based walking and outdoor group physical activity to tackle mental ill health: <i>The Outdoor Partnership</i>
<b>Play Ambassadors</b> (Cardiff and Vale): Increasing play in 10 communities by 60 recruited and trained Play Ambassadors: <i>Play Wales</i>
<b>Sporting Memories</b> (South Wales): Wellbeing through sporting reminiscence and activity: <i>Sporting Memories Network CIC</i>
<b>Super-Agers</b> (Cwm Taf Partnership): Community based physical activity for older people and those with disability or long term illness: <i>Bridgend County Borough Council</i>
<b>Welsh Active Early Years Programme:</b> (National) Intensive community based play and physical activity for young people: <i>Early Years Wales (and Welsh Gymnastics)</i>
<b>West Wales Walking for Wellbeing</b> (West and Mid Wales): Walking Groups linked to GP Practices: <i>Pembrokeshire Coast National Park Authority</i>

<sup>76</sup> This is the Project which ended prematurely as a result of the Covid-19 restrictions. No summary is included because in practice it never fully got off the ground.

## **Actif Woods Wales**

### **Grant funding received £459,000**

The Project engaged adults and children to participate in 'Actif Woods' sessions where they experienced and learned woodland skills, knowledge of the natural environment, and healthy eating, and also participated in woodland-based exercise. The Project was national and participants were typically those from areas with high health needs, low employment rates, and limited access to services.

#### **Project Objectives and Proposed Deliverables**

The Project originally aimed to:

- Increase the mental well-being and physical activity levels of participants, increase time spent outdoors and with others, and increase knowledge and understanding of woodland skills and heritage crafts
- Encourage progression to Agored (an award body for education and training providers) accreditation for 160 participants over two years
- Create volunteering or drop-in woodland groups to improve involvement in the local community
- Reach 1640 participants over two years, including 256 attending Outdoor Health Clusters and 160 engaging online or by telephone
- Deliver 200 training sessions to staff and develop educational content for YouTube.

#### **Actual Delivery and Impact**

The majority of targets were achieved, and delivery was not adversely affected by Covid significantly. They reached 2073 participants, including 456 across four Outdoor Health Clusters and 281 accessing nature chats online or by telephone. A total of 321 training experiences were delivered to 150 staff, and 172 achieved Agored accreditation. The evaluation report indicated that, overall, the mean WEMWBS score for well-being increased from 43 (out of 70) to 50, an increase of 7 well-being points; 71 per cent of participants experienced improved well-being; and 50+ per cent of participants increased IPAQ scores by an average of 476.5 MET points.

#### **Innovative Aspects and Lessons Learned**

Innovations included rolling out at a large scale the core project activity. HAF enabled a much larger and scaled programme than previously attempted. The use of digital was successfully piloted and nature chats over the phone/online were started during Covid lockdowns, and proved to be very successful, and were maintained post-Covid. Lessons identified by the Project included the need for a more bespoke evaluation/data process and for this aspect to be developed in advance of the Project.

**Sustainability Intention:** The HAF project has enabled Small Woods to develop as an organisation. The size of the Project entailed restructuring work and deploying digital tools. Online delivery was piloted. Collectively these changes mean that the work is being carried on post-HAF. Evidence from the Project helped obtain further funding. They reported that the Project's content is therefore continuing and is in a stronger position to do so.

## **Babi Actif**

### **Grant funding received £232,000**

The Babi Actif Project took place across Conwy, Gwynedd and Ynys Môn, led by Eryri-Bywiol Cyf. The Project supported parents and children to get active outdoors during the baby's first 1000 days.

#### **Project Objectives and Proposed Deliverables**

Babi Actif aimed to create a culture of active families by:

- Delivering targeted interventions to overcome real and perceived barriers to getting active outdoors with small children
- Promoting enjoyable, active activities which are accessible to parents and children during baby's first 1000 days
- Identifying and promoting new, innovative activities for families with young children
- Delivering a physical and digital campaign which shares ideas of how to get outdoors and active with babies, and sharing positive stories of how being active enriched family life
- Delivering a minimum of 606 Babi Actif sessions, a mix of tasters, 6-8 week courses and regular drop in sessions, involving 3,000 participants and training 20 volunteers.

#### **Actual Delivery and Impact**

In total, 133 six-to-eight-week courses and 26 three-to-five-week course were delivered as part of the Babi Actif project. 726 sessions were delivered and 48 summer taster sessions. There were high levels of participation, high demand, and positive feedback. The evaluation carried out by Bangor University indicated that attending Babi Actif sessions improved the parent's wellbeing, which increased parental effectiveness, benefitting the baby. While monitoring data could not be analysed statistically due to low response to follow up surveys, respondent data showed that 88 per cent of parents agreed that their own health and/or wellbeing improved because of a Babi Actif session whilst 83 per cent agreed that their baby's health and/or wellbeing improved.

#### **Innovative Aspects and Lessons Learned**

Outdoor activity sessions for parents and young children are not widespread. Babi Actif was especially welcomed during the pandemic, when support and contact with others for new parents and their babies became very limited. The Project learned about the most effective ways to encourage new parents to attend Babi Actif, offering multiple communication options including website, social media, in person and by telephone. Delivery partners learned how they could adapt to provide successful sessions in different locations, and gained better understanding of different communities. The Project also learned that the support of key partners such as Family Services helped them to achieve better engagement, helping to build trust and attendance in new communities, and that having resources to support 'engagement' work was an important enabler.

#### **Sustainability Intention**

Participant ownership of the groups was encouraged, with the Project funding alternate weeks of sessions and groups meeting informally in between, arranged by themselves. The resource 'Things to do before you're two' provides a legacy resource to encourage parents to be active outdoors with their babies. Participants are signposted to other opportunities to be active outdoors, and social media content supports this. The Project has been seeking further funding and was working with partners to maintain provision and support new families.



**Balanced Lives for Care Homes.  
Grant funding received: £308,000**

Balanced Lives for Care Homes aimed to improve the physical, mental, and social wellbeing of mainly sedentary residents in five care homes in the Swansea Bay Health area.

**Project Objectives and Proposed Deliverables:**

The original objective was to provide a weekly programme facilitated by a specialist team and supported by volunteers and care home staff. The approach would be co-designed. Planned deliverables included:

- Support 270 older people to improve their health and wellbeing - 200 would be care home residents and 70 living in the local community invited to join the weekly groups, maximising the potential for care homes as community assets
- Train and support 10 community volunteers
- Train and support 10 care home staff members as Champions.

**Actual Delivery and Impact.**

Activities had to be suspended due to pandemic restrictions and it quickly became clear that Covid would have a detrimental effect on Care Home residents, staff and families. The Project logic model and outcomes were redesigned and submitted to Welsh Government. The Project changed to digital delivery, using Zoom for scheduled sessions, and making the content available on YouTube. As a result, the project consistently delivered to over 300 people a week in 18 venues, with over 12,500 individual participations in online provision.

**Innovative Aspects and Lessons Learned**

The changed approach was a success as it provided a basis for further development and reach, as virtual delivery could be offered pan-Wales. When restrictions allowed, the outside venues were used for social and physical activity sessions and organised walks. The Project learned that social aspects were important in developing confidence and encouraging older people to start participating in their communities again.

The Project established a new connection with Parc Prison and trained peer support mentors there. That success resulted in a commercial contract for Action for Elders to offer their programmes in the Prison from April 2023. The offer was customised for use in a variety of settings including Care Homes, Extra Care, Community Venues, Day Centres, and the Prison. Action for Elders reported that in their view the most important adaptation was a change in the evaluation model from a focus on economic value to social value.

**Sustainability Intention**

Action for Elders trained care home staff and others to learn simple, safe movements that they could practice with their clients/patients without fear of injury. This was a legacy of the Project. Online classes and videos remain as a resource, allowing activities to continue.

Action for Elders is working on diversifying its income streams to avoid relying on short term grant funding. They assess that resilience has become more important than ever as the challenges older people are facing have intensified. As a result, they increased the focus on building resilience to combat loneliness, using the Senses Framework to build meaningful relationships and provide personalised support.

## **BeActive RCT**

### **Grant funding received: £472,000**

The BeActive Project was led by Interlink RCT as a collaboration between six core delivery partners working with wider community groups to establish 'Wellbeing Pathways' focused on outdoor activities delivered by local community and voluntary organisations. It built on the existing community referral infrastructure and involved co-design with community members and linking with a range of services.

#### **Project Objectives and Proposed Deliverables**

The original target was to reach 5,320 participants, of whom 2,930 would be supported on a 'focused' basis and 2,390 on a 'brief' basis. Due to the pandemic, targets were revised in agreement with the HAF to 3,714 participants overall, 1,654 receiving 'focused' interventions and 2,060 'brief', in order to reflect better the Covid-19-altered balance between the two types of engagement.

#### **Actual Delivery and Impact**

BeActive worked with 4,435 participants in total: 1,492 receiving 'focused' interventions and 2,943 'brief' interventions, where this involved more than one session with the impact on the participant's wellbeing was assessed. Overall, the project exceeded its target for 'brief' interventions and came close to meeting its target for 'focused' interventions. Main successes included:

- The impact on the mental and physical health of participants, as indicated in the evaluation report, including reduced loneliness and isolation. Quantitative data gathered from a sample of participants showed 78.1 per cent increased their level of physical activity. 920 BeActive participants who completed both pre and post participation sets of WEMWBS forms showed an average increase in their overall mental well-being of 3.8 on the scale's measurement system. Improvement was essentially retained among those completing six and 12 month follow ups. 64.8 per cent of respondents said their mental well-being had improved because of their involvement with the project.
- Self-sustaining activities and groups that rely on local community members and volunteers were established.
- Links were made between organisations that continued to develop and grow, including community groups, larger charities, GP practices and health professionals.

#### **Innovative Aspects and Lessons Learned**

The Project reported challenges in reaching performance targets, as well as collecting evaluation and outcome data, and in the resources this required. Whilst some of this was related to the pandemic, greater investment in resources and capacity to undertake this with programme support was a key area of learning, and they valued consultant support with evaluation in Year 4 to assist them in dealing with these challenges.

Lessons identified by the Project included that their diverse partnerships with locally embedded community organisations provided flexibility. It was innovative and resilient partners gained a great deal of learning. This success was a result of experienced and trusted community partners who were in touch with local groups and communities, and who constantly innovated and adapted to involve and support participants to take part.

#### **Sustainability Intention**

The Project reported that a wide range of activities continue to be delivered directly as legacy projects by the partners involved, and have developed because of what was learned. A key success was that RHA (formerly Rhondda Housing Association) recognised the positive impact of BeActive on the wellbeing of its tenants and has invested in a permanent Health and Wellbeing post to ensure they can sustain this offer.

## **Cyfeillion Cerdded Cymru** **Grant funding received £271,000**

The Project aimed to improve the physical and mental wellbeing of older people aged 50+, particularly those at risk of social isolation and sedentary lifestyles in South East Wales, Cardiff City Region and part of the valleys, through walking activities and guided group walks.

### **Project Objectives and Proposed Deliverables**

The Project aimed for older people to walk more in their community or care setting and to have an improved sense of physical and mental wellbeing, and be more socially connected. Targets were to work with 90-100 volunteer walk leaders trained through 25-30 events, to lead walking groups of around 10 people, with a total of 260-280 beneficiaries. This involved undertaking 8 community street audits, and producing support materials as necessary.

### **Actual Delivery and Impact**

In practice they recruited 96 volunteer walk leaders, and delivered 38 events. Group sizes varied. 278 participants were engaged, and 9 case studies were produced. The 8 street audits were completed, and various material produced, including [Welcome Activity Booklet](#) (for participants), a Volunteer Training Package, and a [Guide for Practitioners](#) (for partners). The average IPAQ MET-minutes reported by participants at 12 months were 91 percent higher than at baseline, and average WEMWEBS score at 12 months were 11 percent higher than at baseline. The participants formed new connections, and felt less isolated. Walking helped to maintain physical fitness, and develop and maintain mental resilience.

### **Innovative Aspects and Lessons Learned**

These included building effective relationships on the ground between the Project and community organisations with access to and understanding of the target beneficiaries. This is critical to engaging effectively, and fostering a sense of local ownership of activities. They succeeded in embedding the walking groups within the target communities, ensuring that there was a supportive local infrastructure. Fostering a sense of autonomy appears important to sustainability in the longer-term. The flexibility that HAF enabled in terms of encouraging a wide variety of partnerships, and the ability to tailor the walking activities to the specific needs of beneficiaries, was significant in achieving buy-in.

### **Sustainability Intention**

The sustainability strategy was to develop the walking groups, train volunteer walk leaders in the local community, and foster confidence ownership and autonomy of the groups among the beneficiaries and partners, to create continuing independent (or partner-led) walking groups beyond the end of the Project. The Welcome Activity booklet was distributed to communities centres at the end of project and remains a live resource on Living Streets website. The project engaged with many partners and supported them to bring a higher profile to walking in their organisation. The project featured on a Healthy Weight Healthy Wales promotional video.

## **Family Engagement Project**

### **Grant funding received £475,000**

The Project was designed to increase physical activity and associated mental wellbeing levels among families in poverty through bespoke engagement. StreetGames offered this activity in seven localities across Wales through arrangements developed for HAF, with StreetGames as lead body and seven Local Delivery Partnerships (LDP's) comprising 30 delivery partners. Each LDP was designed to address the specific needs and demographics of an area.

### **Project Objectives and Proposed Deliverables**

The aims were:

- That families experiencing poverty and without access to or experience of sporting activity would be engaged and participate in physical activity
- To reach 265 families (1200 individuals) and train 60 staff from partner organisations
- That participating families would feel more involved in decision making around the delivery of local/informal sporting opportunities; have increased confidence, knowledge and competence to become more active and build healthy lifestyle habits; and, have improved social interactions and connections, with associated improvements in mental wellbeing.
- To reduce health inequalities, and develop learning about how to meet the needs of families in poverty and how physical activity can positively impact on their lives.

### **Actual Delivery and Impact**

Based on data generated by the Project using their own tools, delivery exceeded the goals. 468 families (1339 individuals) engaged in physical activity. More than double the number of partner organisations engaged, and 390 staff (versus the original target of 60). The evaluation reported that 265 families had increased their physical activity levels. 265 families had increased emotional and mental wellbeing, and there were increased levels of participation, social interaction and connection within communities.

### **Innovative Aspects and Lessons Learned**

A potentially complex delivery model was designed to allow sufficient flexibility. Systematic feedback ensured that the whole Project benefitted from ongoing learning, which the Project reported was used for continuous improvement. Buying sports clothing and equipment directly addressed one poverty-related barrier to participation. Lessons identified by the Project included the need for a bespoke evaluation/data collection strategy, the need for flexibility with target families, and the importance of an empathetic approach. 'One size fits all' would not have worked over so many different parts of Wales. They found that playing to the strengths of frontline-focused delivery partners was an efficient use of resources.

### **Sustainability Intention**

The aim is to continue the lifespan of LDPs beyond HAF to offer sporting opportunities, and to implement specific changes to processes and practices in partner organisations to enable them to continue delivering interventions. The Project reported they will maintain professional/partner relationships in order to generate new opportunities including funding applications. StreetGames will maintain a leadership role, offering expertise and networking for partners.

## **Growing Together**

### **Grant funding received £295,000**

Growing Together was an intergenerational food growing Project which aimed to improve the health and wellbeing of older vulnerable adults and primary school children through the creation of accessible outdoor garden spaces at five sheltered accommodation sites operated by registered social landlords in deprived areas across Southeast Wales.

#### **Proposed Outcomes and Project Deliverables**

The Project originally aimed to foster improved physical and mental health, as well as active lifestyles, among older adults by bringing them together with children for intergenerational social activities in outdoor spaces. In light of Covid-19, it also adopted the aim to foster digital literacy among older people through intergenerational activities.

#### **Actual Deliverables and Impact**

These were for a target of 100 older adults (191 achieved) and 200 (171) children to lead more active lives through volunteering outdoors, 10 (10) growing spaces improved or created, 5 (5) schools from deprived communities participating, 50 (77) adults benefiting from digital inclusion and 50 (191) from more accessible outdoor spaces, and 100 (282) activities a year coordinated and delivered.

The evaluation report indicated that the Project achieved increased physical activity outdoors for both old and young participants, and better access to green space and more food grown locally. It connected young and old people, and increased time spent with new friends. It improved knowledge of benefits about healthy eating and active lifestyles, and of food growing. It improved short-term mental wellbeing, and improved community assets at sheltered accommodation sites for wildlife, food growing and people, and improved health as a result of volunteering.

#### **Innovative Aspects and Lessons Learned**

In the Project's view the flexibility allowed by HAF was very important to achieving outcomes and impact, allowing adjustment of the Project to create five additional growing sites at schools when Covid-19 prevented in-person intergenerational activities, and to tailor activities to the specific needs and preferences of the target beneficiaries. The Project felt they gained a comprehensive understanding of how to engage the target beneficiaries, and what they would like and feel comfortable to do. This was important when working with older people, many of whom face multiple barriers to taking part.

#### **Sustainability Intention**

The Project's sustainability strategy beyond HAF funding was predicated on constructing community assets (growing sites) in collaboration with partners and beneficiaries, engaging the beneficiaries in activities at the growing sites, fostering a sense of ownership over the sites among the partners and beneficiaries, and transferring ownership to those stakeholders to use them on an ongoing basis.

## **HAPPy**

### **Grant funding received £228,000**

This Project was a partnership between Tredegar House (National Trust), Newport Mind, Growing Space and Duffryn Community Link. It focused on mental health and inactivity in the Tredegar House area of Newport, which has high levels of deprivation with a significant proportion of the population experiencing health challenges. The Project used the grounds of Tredegar House to create opportunities to access parkland and woodland to improve physical and mental wellbeing.

#### **Project Objectives and Proposed Deliverables**

The Project's aims were:

- Improvement in physical and mental health of participants, and a minimum of 50 per cent of participants gaining understanding that their health and wellbeing can be improved through time spent outdoors. A minimum of 50 per cent of participants were to sustain higher levels of physical activity after the project ended, and a minimum of 50 per cent of participants were to exhibit cultural and behavioural change in attitude towards physical activities.
- Communities near Tredegar House would be less sedentary, lose weight and increase their awareness of healthy living.
- Young children from Duffryn would have increased levels of outdoor activity laying a foundation for lifelong healthy behaviours.
- Tredegar House Parkland would be used more widely as a community asset.

#### **Actual Delivery and Impact**

Feedback from partners and participants was positive, and they achieved their target of 700 participants by Project-end. Case studies demonstrated positive impact on individual participants. The mid-point Project evaluation indicated 78 per cent of participants felt positive regarding their wellbeing linked to the activity.

#### **Innovative Aspects and Lessons Learned**

The Project reported that it represented an innovative, new partnership aimed at realising Tredegar House's own longer-standing intentions towards the community, incorporating expertise from specialist organisations. Lessons identified by the Project included the need for project-specific data gathering and evaluation; the quality of the assumptions made at the Project's start; and how to successfully partner with other organisations in the face of multiple challenges.

#### **Sustainability Intention**

The Project's sustainability approach is focused on legacy rather than continuation, alongside behavioural and cultural change within participating communities. The Project reported that National Trust staff and volunteers have developed skills and more confidence in working with people with mental health issues. The intention was that the grounds of Tredegar House will be more commonly used by the local community and that learning from HAPPy will be shared with other Welsh National Trust properties.

## **Healthy and Active Newport** **Grant funding received £460,000**

The Project engaged a group of eight schools and their extended communities in a programme of sporting and physical activity. There was an emphasis on enhancing the skills and capacity of the schools' workforce, and developing a network of volunteers to assist with delivery. The target group of pupils were those who had low levels of physical activity and those whose families did not participate in physical activity. The Project was collaborative and following Covid-19, was through digital delivery.

### **Project Objectives and Proposed Deliverables**

The Project's aims, were to embed a Wellbeing Coach in a network of eight schools to integrate pupils, staff, families and community members into a programme of delivery of sporting activity to increase physical activity levels for Year 3 pupils and their parents, improve mental wellbeing, and increase the confidence of pupils and staff. Families and schools would have increased concern for physical activity and healthy lifestyles. A network of volunteers would assist delivery and sustain the Project longer term, thereby piloting a potentially replicable delivery model. It also aimed to improve behaviours, both relating to healthier lifestyles and more generally in school, and support Newport Local Wellbeing Plan Objectives.

### **Actual Delivery and Impact**

The Project was successful in meeting its objectives, and the pandemic stimulated improvements to delivery. The evaluation reported that overall, 1343 children took part in physical activity, and ultimately displayed behavioural improvement alongside improvements to physical health and mental wellbeing. 960 parents were engaged and 63 had improved healthy lifestyle behaviours. 64 school staff accessed training. During pandemic-related school closures, the Project adapted to encourage/facilitate children to participate in sporting activity under lockdown constraints.

### **Innovative Aspects and Lessons Learned**

There was a high degree of innovation. Pandemic-restrictions and challenges in reaching families resulted in several new initiatives. These included undertaking focus groups with children to inform delivery, a sports equipment lending library, radio/podcast broadcasting, digital delivery and engagement, and development of a customised app to engage with participants. Lessons identified by the Project included the need to develop customised data collection strategies, the importance of taking time to understand schools as complex organisations, the value of co-production to inform project design, and how relative poverty in families is a significant barrier to participation in sporting activity.

### **Sustainability Intention**

The Project reported that elements of this Project will be sustained. A physical sports equipment and digital content library have been left in place, and staff and volunteers who have attained skills and confidence can continue activity. They also perceived a legacy of cultural change which may also continue to have positive impact. The core activity of the Project is not, however, expected to continue.

## **Healthy Body Healthy Mind** **Grant funding received £449,000**

Healthy Body Healthy Mind was led by Women Connect First and covered Cardiff and the surrounding areas. It engaged Black, Asian, and Minority Ethnic women and their families in physical activity and healthy lifestyles.

### **Project Objectives and Proposed Deliverables**

The Project's aims were:

- To support Black, Asian and Minority Ethnic women and their families to become more aware of the benefits of engaging in physical activity, eating healthily and engaging more with health prevention activities
- To help Black, Asian and Minority Ethnic women and their families improve their physical health and mental wellbeing, and to train Black, Asian and Minority Ethnic women to promote and provide health, wellbeing and leisure advice to and/or on behalf of their peers
- To support public service providers (including leisure facilities) to make changes to their practice relating to Black, Asian and Minority Ethnic women and their families.

### **Actual Delivery and Impact**

The Project engaged with 493 beneficiaries over four years and 74 partner organisations. In addition, it worked closely with a variety of health services to influence and inform them of the target population's needs. It also created a referral system so that more participants could contact them and be engaged. 56 women received Women's Health Champion or other volunteer training to be able to promote and provide health, wellbeing and/or leisure advice to, and/or on behalf of, their peers. The evaluation report presented evidence suggesting that participants had improved physical health and well-being. 90 per cent of participants felt they had more knowledge of the benefits of physical exercise, eating healthily and learning more about their health.

### **Innovative Aspects and Lessons Learned**

The introduction of virtual sessions during the pandemic meant that more female family members engaged, including children, with higher numbers than originally anticipated and reaching a wide range of ethnic minority communities. The Project introduced a greater variety of activities than originally planned, including cooking for children. Many of these participants then returned to face-to-face activities, having gained confidence in the facilitators, despite restrictions associated with their cultural needs and sensitivities. Staff had to respond to higher demand and accommodated more sessions and activities than planned.

### **Sustainability Intention**

There was high demand for activities and some were oversubscribed. Post the HAF funding, fewer activities can be offered, and venue hire and tutor costs rose during the cost of living crisis. A nominal fee was introduced for some activities (£1-£2) but participants were willing to contribute and this has supported sustainability. The Project reported that 10 public service providers have made changes as a result of the Project to their practice relating to Black, Asian and Ethnic Minority women or their families, providing some legacy of learning. The Project also attracted £210,000 of funding over three years from Welsh Government's Anti-Racist Wales Action Plan's Culture, Heritage and Sport Fund, to continue some of the activities begun through HAF. They planned to continue looking for alternative sources of funding, and to pursue partnership working and opportunities to collaborate as delivery partners with national organisations.



## **Opening Doors to the Outdoors**

### **Grant funding received £285,000**

This Project aimed to increase physical activity levels and mental wellbeing amongst participants with mental and physical health issues, through a collaborative pilot social prescribing project, working with partners from the outdoor and health sectors in North Wales.

#### **Project Objectives and Proposed Deliverables**

Using existing structures, a collaboration of partners from the outdoor and health sectors sought to increase physical activity levels, improve mental and physical health, and link local community clubs with mental health teams, enabling patients to lead independent, long term, active lifestyles. The aims were:

- To recruit participants with mental health issues, provide training for staff and volunteers, and set up community groups/clubs to offer mutual support and help develop confidence and skills to access the outdoors.
- To deliver an outdoor activity intervention programme involving 12 sessions over 12 weeks (walking and climbing, water sports and mountain biking), led by a qualified outdoor instructor trained in mental health awareness
- To create a replicable model.

#### **Actual Delivery and Impact**

The Project could not be delivered virtually and so the pandemic delayed engagement with all partners. There were 116 participants over 4 years. 64 per cent were not in paid employment and 60 per cent stated a chronic health condition or disability. The evaluation report indicated that 69 per cent reported that their mental health had improved. 44 per cent reported an improvement in activity levels of 30 minutes or more per week, 36 per cent of 60 minutes or more, and 22 per cent of 90 minutes or more. Social return on investment was a specific focus of the Project's evaluation, and they reported that up to £5.36 was generated in social return for every £1 invested.

#### **Innovative Aspects and Lessons Learned**

The Project experienced a rise in demand as a result of the pandemic. They recognised that a focus on just two of the four activities was essential. The Project reported that governance was critical, and provided structure and support, and underpinned ways of working through documented partnership agreements, health and safety related issues, and maintaining systematic communication. Further learning identified by the Project included that word of mouth was key to promoting awareness and expanding the referral group, and that practical aspects such as varying start locations and concluding with a 'social café' element were important in achieving engagement.

#### **Sustainability Intention**

The core notion that 'the outdoors is available to everyone' is at the heart of the Project's sustainability approach. The Outdoor Partnership maintained some of the activities, and explored an affordable continuation model by upskilling staff, increasing the number of clubs, and equipping participants to also deliver courses. Informal sessions were also established to maintain interaction between participants post-funding. A new Support Officer was employed to identify potential funding, and the social value model became integrated into all their core programmes.

## **Play Wales Ambassadors**

### **Grant funding received £216,000**

The Project had complementary aims to train young people aged 14-19 to become Play Ambassadors and provide a path to qualification and work placement in Play. Further work was to be carried out to enable Play Ambassadors to facilitate play opportunities across Cardiff and the Vale of Glamorgan.

#### **Project Objectives and Proposed Deliverables**

The Project's aims included:

- Creating play opportunities for 500 children to improve physical and mental health outcomes
- Delivering 250 play sessions and establishing five community play action groups
- 75 per cent of Play Ambassadors to achieve Level 1 accreditation and 25 per cent to progress to a Level 2 qualification
- A 40 per cent increase in community satisfaction with local play provision
- Resources developed for future use and Project replication.

#### **Actual Delivery and Impact**

The Project experienced challenges related to Covid-19. Play Ambassadors provided play opportunities for 2392 children. A total of 127 14-19 year olds completed a Level 1 Play Work qualification and 29 of these continued to complete a Level 2 qualification. Play Action Groups and accredited individuals supported play in new places. Improved connections have been developed with local authority staff and communities. The evaluation report indicated that physical and mental benefits have been created by participating in play. Community cohesion, confidence and wellbeing improvements were also observed.

#### **Innovative Aspects and Lessons Learned**

Addressing play worker capacity by developing and mentoring young people aged 14-19 is an innovation that both benefited those young people and the children they then helped. Digitally-delivered training was an innovation for Play Wales. A further innovation was the deep partnership work between voluntary and community groups, local authority staff and Play Ambassadors. Wide and deep networks helped to support the Project's aims. Lessons identified by the Project included how the example of play being delivered on the ground can help local authorities to resume supporting play activities after pandemic conditions by providing a working model for them to adopt. Other lessons included the value of digital training, and the importance of financial resources to improve play opportunities.

#### **Sustainability Intention**

The key approach was to extend the Project through the continuing efforts of the Play Ambassadors in communities post-HAF, supported by local authority play teams. Discussions are in place to repeat the Project in other localities. Learning generated from the project has informed a range of resources soon to be made freely available:

- An endorsed play and playwork training course
- A community play network toolkit
- Community playscheme guidance

## **Sporting Memories**

### **Grant funding received £461,000**

Sporting Memories supported the mental and physical wellbeing of people over 50 using the power of sport to engage with people living with dementia or depression, or who were socially isolated in South Wales.

#### **Project Objectives and Proposed Deliverables**

The original Project plan was to open 30 community clubs and deliver three activity weekends with a target to reach 750 participants and recruit 100 volunteers by March 2022. Due to the pandemic, a grant delay and staff turnover, this was revised to 15 community clubs and six online clubs, targeting 500 participants and 80 volunteers. To adapt to the pandemic, 12 telephone circles (networks) were built, and the distribution of 150 kitbags was planned.

#### **Actual Delivery and impact**

A total of 21 community clubs were created, with 15 continuing to operate at the end of the funding period. Six online clubs were created, and kitbags reached 58 individuals in 2021. The telephone circles ran until August 2021 when the platform provider went into liquidation. Events were delivered across three weekends. The evaluation report indicated that attendees became more physically active and felt more confident in pursuing physical activities, both within the clubs and in their daily lives. 57 per cent of participants surveyed said they met up with other participants outside of weekly clubs, with a third of these meeting up weekly. 37 per cent said they attended other activities due to Sporting Memories clubs. 29 per cent were now not concerned about falling over and 38 per cent not very concerned, highlighting how the clubs have supported older people in their balance and strength. Volunteers and partners observed the change in participants, which happened quickly after attending for the first time. The Project found that once members attended activities, they remained. Volunteers themselves felt valued, enjoyed giving back to the community, felt rewarded, made new friends and made a difference to other people's lives. 88 per cent of volunteers stated that the Project had improved their mental health.

#### **Innovative Aspects and Lessons Learned**

The Project was quick to develop new resources and ways to reach participants under Covid-19 through a blended delivery model, including training adaptations. Initially, it relied on two trainers in England to develop volunteers. Covid-19 allowed them to develop online training, offering more flexibility and a more cost-effective approach. Online training is now core to delivery across the UK. The timing of opening new clubs was important and they learned that opening between February and October achieved a higher number of attendees. The Project learned that older people, whilst eager to get back to face to face provision, required time to feel confident in coming back to community settings. But this confidence grew quickly. Outdoor settings were used in summer as a gradual step back to community delivery. Sporting Memories gained more reach through partnerships in local communities, without which they reported they would have struggled to fully deliver the programme.

#### **Sustainability Intention**

After start-up, they used volunteers to support the ongoing facilitation of clubs. Clubs used local fundraising or nominal weekly donations to cover refreshments. They worked closely with Ageing Well in Wales to ensure that the Project has lasting impact and reach. They planned to seek additional external funds through local funding sources (e.g. trusts and foundations) and through links with Local Health Boards to cover management costs for the Project and potential expansion into other areas of Wales.

## **Super Agers**

### **Grant funding received £393,000**

The Super Agers Project took place across Bridgend, Merthyr Tydfil and Rhondda Cynon Taf. Its focus was the development of physical activity opportunities for older people aged 50+, some with additional care needs. Many opportunities would be enabled through training volunteers of all ages, aiding sustainability beyond HAF. The Project emphasised preventative approaches to complement wider local and national strategies aimed at supporting older people.

#### **Project Objectives and Proposed Deliverables:**

The Project's aims were:

- For 2000 older adults to participate in physical activity and adopt habits that contribute to healthier lifestyles, leading to improved mental wellbeing, improved postural stability and reduced fear of falling, and reduced loneliness
- To improve older people's access to information relating to active aging, and increase numbers participating in sporting activity to 3+ times per week
- for 100 older adults to be trained as activity leaders and Community Champions.

#### **Actual Delivery and Impact**

2000 older adults participated in sporting activities. Over 90 older adults were trained as delivery volunteers, and 120 further volunteers were trained as activity/community leaders. 13 hubs opened to deliver activity. During Covid-19, a bespoke approach was developed for 124 housebound older and vulnerable persons, enabling physical activity and engagement. Ways of engaging people were improved. The evaluation report indicated that 100 per cent felt that the Project had increased their sense of wellbeing. 23 per cent raised their physical activity levels and 54 per cent raised their MET scores. 68 per cent reported improved mental wellbeing, and 75 per cent reported feeling less lonely or isolated. They achieved an SROI ratio of 3.8:1 - nearly four times the cost of the investment. The Project was recognised as an exemplar by the Bevan Foundation.

#### **Innovative Aspects and Lessons Learned**

The Project was integrated into Council services and strategies for older residents to complement and deepen existing work. It has allowed a hard-to-reach group of older home-bound residents to access activities. Deep consultation with individuals led to the identification of effective, age-appropriate tools for engagement. Lessons identified by the Project included the need for engagement and delivery to be co-owned and responsive; that the leisure sector is not the only avenue for inclusive delivery; that digital delivery is not desirable for some older people; and that the act of participation can be as valuable as the activity itself.

#### **Sustainability Intention**

The Project left the HAF after the initial 3-year funding period as its original sustainability strategy was implemented on schedule. Learnings, processes and strategies from the Project have been folded into three coordinated localities. The main strategy and activities will be continued and managed locally in some form. The Project Lead remains in a senior Council position, allowing continued involvement and oversight.

## **Welsh Active Early Years** **Grant funding received £442,000**

This Project aimed to bridge the gap in knowledge about physical literacy for children under 4 years of age in various locations across Wales, building on the principles of Play to Learn, and to create sustainable programmes of physical activity for children and adults to enhance their physical literacy and mental well-being.

### **Project Objectives and Proposed Deliverables**

Early Years Wales and Welsh Gymnastics planned to work collaboratively:

- To reach 120 children aged 0-5 and 120 adults/caregivers over the 3-year period through Active Together, a 4-week community-based programme delivered in either a childcare setting, parent and toddler community group, or Welsh Gymnastics community club context
- To reach 120 practitioners (professionals/key volunteers) through Play to Learn Plus, a 1-day training course, to provide key messages about physical activity, well-being, physical literacy and mental health.

### **Actual Delivery and Impact**

The Project delivered programmes and resources, including Active Together Wales, Play to Learn Plus, Active Baby, Toddle Waddle, Play Move Thrive, and professional development resources. The Project achieved participation numbers of 315 parent/carers, 330 children, and 415 early years practitioners, and delivered programmes in Gymnastic facilities, community centres, childcare provision, parks and public spaces, and directly into caregivers' homes through digital connections.

### **Innovative Aspects and Lessons Learned**

The Project demonstrated that early physical activity is not space-dependent but is enhanced by adults learning how to explore the opportunities for movement in the environment they can access with and for the child. The Project identified that practitioner training is an essential element of legacy building as it encourages parents and carers to develop their own approaches to suit their children's individual needs and situations, and to take ownership of future provision. Another lesson identified by the Project was the need to establish wider networks and connections with organisations and providers that can help establish pathways that parents can follow to continue their physical literacy journeys.

### **Sustainability Intention**

The Project adopted a range of approaches to sustaining activities, including membership of Early Years Wales, Active Baby at Home training, website information and resources, continued work with sport and community partners, continued (subsidised) delivery of training and coaching sessions for practitioners, the development of follow on programmes by Early Years Wales and partners, and mainstreaming learning into Early Years Wales' ongoing work.

## **West Wales Walking for Wellbeing Grant funding received £318,000**

The Project operated in Pembrokeshire, Carmarthenshire and Ceredigion, led by Pembrokeshire Coast National Park Authority. Through walking, it aimed for individuals to become more physically active, with a focus on those who live sedentary or relatively inactive lives.

### **Project Objectives and Deliverables:**

The aims were:

- For three local authority-based walk coordinators to deliver 200 walks each per year, with an average of ten walkers per group
- To create referral links with 27 GP practices and community settings, as well as self-referral and connections with the National Exercise Referral Scheme
- To develop a model for sustainable walking groups linked to GP practices, increase physical activity levels of sedentary people and those with low physical activity levels, and improve mental well-being and reduce feelings of isolation and loneliness through walking group participation with opportunities for social interaction.

### **Actual Delivery and Impact**

The original model was adapted due to pandemic restrictions. Engagement with the primary care sector was a challenge. Operational restrictions varied across local authorities, and the role of walking groups in reducing social isolation became more important. The Project observed an increased appetite for outdoor activity. Overall, 1,470 walks were delivered. 11,608 took part in groups and 2,385 in the virtual programme. 80 volunteers were recruited and trained as walk leaders. Walkers were older adults, with a higher proportion of females, and a majority with medical conditions. The Project reported that evidence from participants showed that the motivation was to keep active, meet new friends, raise their spirits, and to get out of the house. Participants reported to the Project that they felt happier, fitter and less isolated as a result of their participation. An independent evaluation reported that the Project was well regarded by individuals and partners, and seen as supporting social prescribing.

### **Innovative Aspects and Lessons Learned**

New ways to engage included developing virtual walking challenges and associated website and registration processes, taking into account varying levels of digital literacy. Partners included third sector, national park and local authorities, giving the workforce an opportunity to expand networks and share insight into what works for different communities. Due to the challenge of engaging with GP practices, co-ordinators developed links instead with existing community groups such as Mind, and provided walk leader training to enable them to undertake their own walks.

### **Sustainability Intention**

The Project obtained additional funding from Natural Resources Wales for a further year of activity to December 2023, and is moving towards groups requiring only minimum levels of support. Some are almost self-sustaining, others need support and occasionally paid staff to lead walks. The Project considered that some funding would always be required to manage groups safely and provide training and support for volunteers.

## **Annex 2: THE HAF PROGRAMME EVALUATION TEAM**

Dr Clive Grace, O.B.E. - Project Director

Tim Allen – Senior Research Delivery

Mike Bennett – Senior Research Delivery

Nick Greenhalgh – Core Research and Delivery

Sandra Harris - Project Manager

Professor Steve Martin - Research Methods and Quality Assurance

Becca Mattingley – Core Research and Delivery

Nicky Schlatter – Core Research and Delivery

Liam Whittington - Core Research and Delivery

## Annex 3: TOPIC GUIDES STAGE 4

### A: Topic Guide for Programme Actors:

#### HEALTHY AND ACTIVE FUND PROGRAMME LEVEL EVALUATION

##### Topic Guide – Programme level actors (July 2023)

###### FACE SHEET DATA

Interviewee Name:

Interviewee organisation:

Interviewer:

Interview Date:

###### CONTEXT AND AGREEMENT TO PARTICIPATE

Briefly rehearse purpose of the evaluation.

Remind them that our evaluation seeks to gain **insights from across the programme as a whole**. We're interested to hear what they think has worked and why? What hasn't worked? What could be learned for future programmes?

Explain that the aim of this interview is to **hear about their experiences of and reflections on the HAF programme** from the perspective of national partners.

Give **assurance of confidentiality**. Privacy notices have been issued and our reports will be published. But information and views expressed will not be attributed to individuals without their express written prior permission. (A copy the privacy Notice is attached.)

###### YOUR ROLE IN YOUR ORGANISATION

First, please can you tell me a bit about your current role and responsibilities.

1. How long have you been working in your current role?
2. What are your main responsibilities in that role?

###### YOUR INVOLVEMENT WITH THE HAF

3. How long have you been involved with the HAF?
4. What are the main roles that you have played in the HAF?
5. Were you involved in its design?
6. Were you involved in the selection of HAF projects?



If yes, what are your reflections on the application and selection process? What worked? What, if anything, could have been improved? (This may be too far back for strong recollections, but it will be interesting to know if, for example, they intend to revisit the applications in the light of what has happened, and in light of the local level evaluations.)

Do you have any further reflections on the HAF's design and/or application and selection process from the current vantage point, now the fund has ended.

### **EXPECTATIONS AND INNOVATION**

7. What were your/your organisation's hopes and expectations for the HAF?
8. To what extent were those objectives shared by the other national partners?
9. How much of an innovation was the HAF for your organisation?  
In what ways was it different to previous approaches that it has supported?

### **OUTCOMES**

10. What are your overall reflections on the HAF scheme as a whole?  
Prompt - What has worked well? What hasn't worked? What are the key lessons?
11. What have been the main challenges that the HAF as a whole has encountered?
12. To what extent has the HAF led to improvements in physical activity and mental health/wellbeing? Do you have any further reflections on the HAF's design and/or application and selection process from the current vantage point, now the fund has ended?
13. Has it encouraged projects to adopt innovative ways of working that are sustainable and scalable and can be picked up by others?
14. Have the lessons from the HAF influenced other programmes and interventions (or are they likely to do so in future)? Are there lessons from the HAF projects as well as the programme on both the 'what' and the 'how'? Are there lessons in respect of collaboration in particular which can be learned?
15. What impact, if any, has HAF had on your own and/or other organisations' policies and programmes?

### **PROJECTS**

16. How well have HAF projects been supported?
17. Do you think that projects have piloted innovative approaches?  
If yes, in what ways?

18. Have projects produced new collaborations?

19. Have workforce skills and capacities grown?

#### **ENABLERS**

20. What are your reflections on the way in which the Project Board has worked?

What worked well? What challenges has it faced?

Has the CO process worked well?

How have the Project Board sub-groups (Delivery and Evaluation) worked?

21. How effectively have the national partners worked together? Have the 'ways of working' been visible, and if so how have they worked?

22. Have the resources allocated to support the HAF programme been appropriate?

23. How well have projects' achievements been monitored and evaluated by the HAF programme level actors and bodies?

#### **WRAP UP AND THANK YOU**

24. Is there anything else that you think would be useful for us to be aware of for our evaluation?

## B: Topic Guide for Project Interviews:

# HEALTHY AND ACTIVE FUND PROGRAMME LEVEL EVALUATION INTERVIEWS WITH PROJECT LEADS

## Topic Guide - June 2023

### Guidance for Interviewers

- **Purpose** - This round of interviews follows your re-engagement with projects earlier this year and contributes to our Final Report, which is due in late 2023.
- **Interviewees** – Interviews are focused at project level. There will be separate conversations with the Board to gather updated information on their views on the programme.
- **Focus** – These interviews are the concluding interviews with Projects. Aside from the sustainability element next year? They come quite soon after those conducted for the Interim Report for 2022. So whilst some updating on issues will be requested, it will be important not to go over ‘old ground’, especially since the PHW work on Project evaluations will also entail interviews with Project Leads, albeit on that particular topic.
  - The TG follows the slide deck template as appropriate, to assist you in marshalling material in a convenient way. The template of course requires data and evidence from project level documentation, and to a greater degree than for the Interim Reports.
  - Information from projects will be important about impacts on participants and also wider societal benefits as per the original ToC
  - We will be looking for exemplars of activities or achievements that they think might be worth sharing with other projects and with the Board
  - Documentary material that projects hold which could be useful to our evaluation. This should be identified with Project Leads, but directed through Welsh Government unless it is clear that it is over and above the data drops and other returns that Projects are required to make to the Welsh Government.
- **Public Health Wales:** As previously notified, PHW are conducting a parallel evaluation which focusses only on the Project level evaluations which they (the Projects) have conducted. There is a process being discussed for PHW to signal the parallel character of their work. You will be kept advised and should be aware of when/how they make contact with Projects. Inevitably there is potential for some confusion and duplication, so please manage any issues which arise.
- **Preparation**
  - In advance of the interview, please read para 6.5 of the Project Applications and annual progress reports and end fund report and evaluation report, where already available (i.e. uploaded in Objective Connect)
  - Please re-familiarise yourself with your interview for 2023.
- **Timeline** – Please schedule your interviews for late June or July.
- **Reporting** – We are aiming to complete the analysis of interview data in August.

### FACTSHEET DATA

Project name and number:

Interviewee's name and role:

Date:

Interviewer:

## **CONTEXT**

Remind interviewee that we have been commissioned to conduct an evaluation of the HAF programme as a whole. This will complement local project-led evaluations which are the subject of a separate interview with PHW. We have been asked to assess:

- Has supporting projects by the HAF increased physical activity and wellbeing for target groups?
- Has HAF funding instilled the five ways of working?
- Has the HAF identified and tested innovative interventions?
- What lessons from projects can be scaled up and rolled out more widely?
- Are projects' achievements going to be sustainable beyond HAF funding?
- What lessons can be learnt from HAF for other programmes?

## **PARTICIPATION AND PRIVACY**

Thank interviewee for their participation.

Explain that information from the interview will feed into our Final Report that we will produce in late 2023. Information and views expressed will not be attributed to individuals or Projects without their express written prior permission and we will check any examples that we cite in advance with project leads.

Note that this interview is relatively close to the previous one, and that we will avoid going over old ground where possible.

## **UPDATES**

1. Is there any update on any remaining legacy from the COVID-19 pandemic?
2. Is there any update on your approach to community engagement?
3. Is there any update on your approach to sustainability?
4. Is there any update on your partnership working?
5. Is there any update on your approach to learning?
6. How will you be capturing and keeping the results and the learning from the Project as a whole, and how, if at all, will you disseminate it?

## **IMPACTS ON PARTICIPANTS**

7. Please can you outline the data and evidence you currently have about impacts on participants in 2023? Is some of this data/evidence more comprehensive/reliable than others? If yes, what data are you most confident about? What are the main gaps?
8. What have been the Project's wider benefits?
9. Are there any groups or types of impacts which it has been more particularly challenging to gather impact data about? If yes, what are these? Have you found ways to overcome the difficulties?

## OVERALL ASSESSMENT

### 10. Using [this] scale, how would you rate the following aspects of your project?

1. Well above expectations
2. Slightly above expectations
3. As expected
4. Slightly below expectations
5. Well below expectations

#### a. Achievement of original objectives

- PROBE: To what extent / in what way did it achieve additional objectives, or objectives that were different, to those originally planned?
- PROBE: Were the objectives achieved below budget, on budget or above budget?
- PROBE: Would you say the project emerged from COVID weaker, about the same, or stronger than before?

#### b. Number of participants reached

- PROBE: To what extent were these participants in the HAF's key target groups
- PROBE: To what extent were these the Project's intended type of participants?

#### c. Number of partnerships

#### d. Quality of partnerships

#### e. Extent of community engagement

#### f. Quality of community engagement

#### g. Value of learning to the organisation's future interventions

#### h. Sustainability (current or likely future)

*(depending on what is said, and the responses given, please probe and record any further elaborations.)*

11. Would you say the support you received from the Case Officer was... very useful, fairly useful, not very useful or not at all useful?

12. What do you think are the most important lessons that should be learned when designing future programmes to increase physical activity and wellbeing for the HAF target groups?

## SUPPORT FROM THE PROGRAMME LEVEL

13. What (if anything) could the Programme level actors of the HAF have done to help support the project across the course of the HAF Programme? Please distinguish:

- a. The Board overseeing the HAF
- b. The Case Officer(s)
- c. The Delivery Group
- d. The Evaluation Group

14. What support, if any, could these actors provide going forward to support the sustainability of the project or its activities/impacts?

15. In terms of the HAF programme as a whole:

- a. What did/did not work well?
- b. What were the challenges (please refer to the enabling factors in the diagram below)?

- c. What difference did the HAF programme make as a Programme (including beyond just its financial resource to the Project) in relation to what has been delivered, how it has been delivered, and what has been achieved.

**PARTNER CONTACTS**

16. Explain that we intend to speak with one or two of their partners to discuss how the process of being a Partner worked, rather than any partner assessment of their Project. Ask for contact details, and ideally a cross-email introduction.

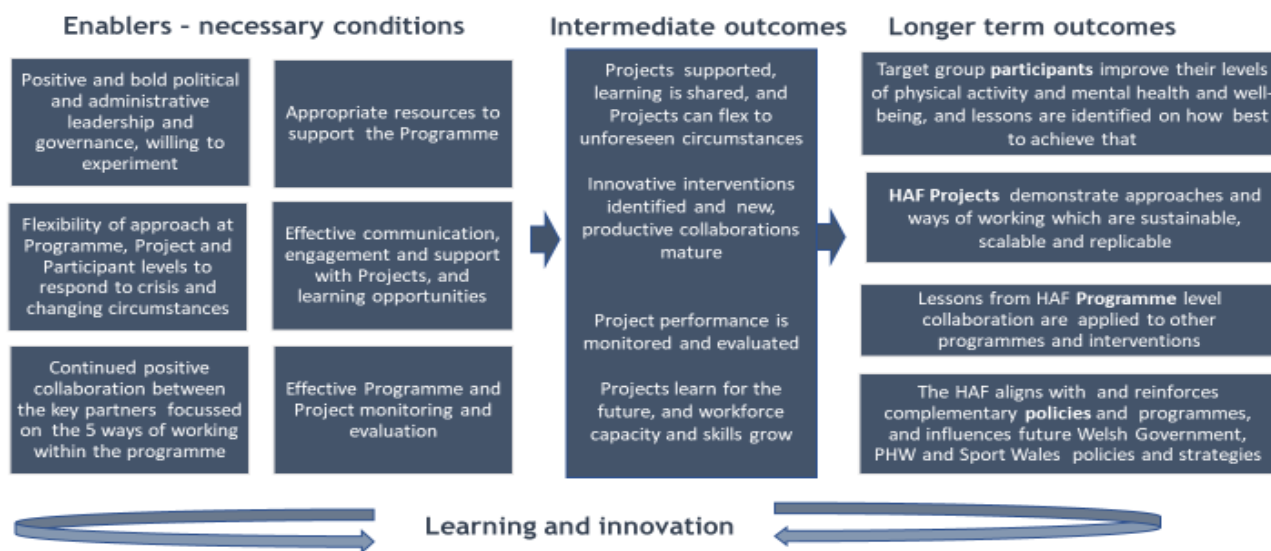
**FUTURE CONTACT**

17. Who will be the future contact for the Project? (Noting that there may be queries, and that in 2024 we will be in touch re sustainability issues.)

**DOCUMENTARY MATERIAL**

18. Please can you send to WG copies of documentary material you have that is relevant to our evaluation (e.g. internal progress reports, reports to Boards of Governance, promotional materials, web or FB based information, twitter feeds, including any quantitative or statistical material)?  
*Note – Projects should not send raw data to us.*

## HAF Theory of Change Going Forward During the Programme



**ANY OTHER COMMENTS**

19. Are there any other issues that you would like us to take account of at this stage?

**THANK YOU**

- Explain next steps in the evaluation – that is, a Final Report by end 2023, and a follow on, retrospective assessment particularly around sustainability, which has now been agreed.
- Thank interviewee for their time.