

*June 2020*

# Collaborative Networks Process Evaluation

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**Final report**

Paula Knee, Vivek Seth, Martin Wain, Billy Bryan, Costanza Tiriduzzi, Pascal Halbeisen, and Billie-Louise Schlich



Version 1

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## 1 Summary

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### **Evaluation of the BtB Collaborative Networks pilot programmes**

- Be the Business (BtB) appointed Technopolis to carry out a process evaluation of their Collaborative Networks programme. The evaluation addresses how the programme, in its early pilot phase, has delivered against its aims and objectives, and what lessons can be learned to help improve future programme delivery and performance both within the pilots and for roll-out to other regions. A secondary focus is to determine the early programme impacts on participants, and any barriers or facilitators which again can inform future programme delivery.
- The evaluation took a mixed method approach, based on an analysis of programme data and an extensive interview programme encompassing programme owners and stakeholders at BtB and within BEIS, delivery partners, and participants from the two pilots.
- The participating business interviews were selected following discussions with the BtB programme team and focused on those they believed had engaged most with the two pilots' activities. Using such a purposive sampling criteria plus the incomplete nature of monitoring data for both pilots means that we cannot make any claims on the representativeness of the sample. The study team conducted 52 interviews: 24 with participants in Cornwall; 19 with participants in the North West and nine with stakeholders, BtB staff and delivery partners.

### **Programme design - how does it work and does it align with the rationale and objectives?**

- The Collaborative Networks programme has its roots in a 2015 report by the Productivity Leadership Group that examined the issues behind the UK's lacklustre productivity. The report highlighted that relatively simple management changes can boost productivity, but that a lack of collaboration and knowledge diffusion amongst UK businesses, SMEs in particular, meant that many businesses were often not aware of the management changes they could make to improve their performance. It emphasised the importance of businesses working together to identify their own strengths and weaknesses, and share best practice. Ultimately, lots of businesses making modest improvements could have a considerable impact on UK productivity.
- In light of this, Be the Business developed an idea for a new business support programme, the Collaborative Networks (CN) programme, with the objective of bringing businesses together to improve information and knowledge flow between firms and to create sustainable networks of firms that will continue to support these processes into the future.
- BtB is currently piloting the Programme in two regions: in Cornwall with a focus on the hospitality sector; and in the North West of England focused on family-owned firms.
- While existing BtB links with local stakeholders drove the selection of the two regions, both pilots address regions and businesses with particularly low productivity levels. They therefore have the potential to benefit from the right forms of business support. The county of Cornwall, the hospitality sector and family-owned businesses are all low productivity performers. The NW, as a large region, contains a wide range of productivity levels but the pilot strove to reach out to businesses outside the typically higher performing urban centres.
- The pilots are each implementing a different set of activities but both aim to bring like-minded businesses together in what are predominantly learning-based activities. The activities are intentionally designed to range from relatively 'light' interventions such as



roadshows and business awards, through to progressively more intensive learning activities such as open day visits to local businesses and half-day masterclasses, and through to the even more in-depth business placements and action-learning groups. Importantly, many activities are designed to be led by experienced business leaders so that the learning comes from other businesses.

- In Cornwall, BtB delivers the majority of the pilot itself based on a set of collaborative learning activities that they wished to trial as the Collaborative Networks 'offer'. In the NW, local delivery partners largely deliver the pilot, with the activities based on consultation between BtB and existing local business support experts at the start of the pilot and designed to fill gaps in local provision.
- We conclude that the two pilot programmes are suitably designed and align with the Collaborative Networks' rationale and objectives – the pilots focus on regions and businesses that face challenges and that could therefore benefit from support. The pilots additionally implement activities that aim to increase connections between, and create learning opportunities for local businesses.

### **Is the programme reaching the target audience?**

- The monitoring data collected for the pilots is incomplete and we present preliminary conclusions based on the data available.
- To date, both pilots appear to be reaching their target audiences within each region - hospitality sector in Cornwall and family-owned businesses in the NW - indicating that the recruitment activities have been largely successful.
- The Cornwall pilot has supported 331 individuals from 259 hospitality businesses across the county. The monitoring data available indicate that 46% of the business are in food and drink and 34% in accommodation. Data on firm size is fairly limited, available for only 28% of the total and for this group: 51% were micro businesses, 26% small, 11% medium and 11% large.
- The NW pilot has supported 269 individuals from 218 family-owned businesses. Firm size data was available for 42% of those supported. Of these, 37% were micro businesses, 29% small, 28% medium and 6% large.
- Based on the data available both pilots appear to have reached a large proportion of micro businesses, again within the specified target audience of SMEs. Micro businesses make up a considerable share of both the hospitality sector (around 80%) and family-owned businesses (98%) in the UK so it is to be expected that they will represent a large proportion of participants.
- The NW has arguably been more successful in reaching its target audience (albeit the number of micro-businesses supported is a little higher than BtB may have wanted), reaching a reasonably comparable number of individuals as the Cornwall pilot in half the time. This is likely to be a result of pre-pilot market research, the greater use of local delivery partners with local knowledge, and the NW adopting a much more targeted and focused recruitment strategy (Cornwall used a more blanket recruitment approach to the Cornwall hospitality sector).
- While only just over a year old, it is possible that the NW pilot may have already accessed most of the 'easiest' to reach family-owned businesses via the local partners and established communication channels. To extend their reach, these local partners may need to draw on additional resources. This might result in diminishing returns and therefore BtB needs to carefully consider the balance of effort versus benefits to be gained. Instead, BtB may want



to work with additional delivery partners that have different geographical spheres of influence to those the NW pilot currently uses.

### **Which mechanisms are most effective? / How well do they align with participants' needs?**

- The personal motivations of participants are largely the same in both regions and align with the pilot programmes' 'offer' in that they wish to increase their networks, take the opportunities offered for learning, and develop themselves as business owners. Business-wise their needs reflect the different types of businesses in each pilot, while all participating businesses want to grow revenue, in Cornwall there is, for example a greater focus on improving customer experience, and in the NW navigating the transition of business ownership.
- Key to the success of this programme design is that the information and learning on offer is relevant to the target audience and that participating individuals are willing to share their knowledge and experience.
  - The majority of participants in both pilots found the activities relevant, well-run and provided opportunities to meet other relevant businesses. In the NW, all the different activities were well-regarded in terms of their perceived usefulness, especially the more intensive activities such as the Advisory Boards and business placements. In Cornwall, all activities except the Cornwall Tourism awards, were fairly equally well-regarded albeit with a slightly larger range of opinions.
  - In Cornwall, participants wanted to engage with 'like-minded' businesses, but had different views as to what that was: some took quite a narrow view ('very like me') and others a much broader one (open to learning from experienced business leaders from outside Cornwall or outside their specific sub-sector). While this might have implications for programme design, it may be a signifier of a rather closed attitude to learning and improvement and therefore part of the problem the programme is trying to overcome. To be successful the programme needs to be able to secure participation from both those willing to learn and those who are more sceptical or do not believe they need help. This may require different approaches to marketing and to the offer itself; ranging from intensive 'hands-on' persuasion to move participants on to the in-depth activities and careful matching of participants with people they can learn from.
  - Businesses report that willingness to share information is mainly limited by the extent to which they are interacting with direct competitors i.e. sharing is lower with direct competitors. For the NW pilot this is less of an issue as the breadth of sectoral coverage of the family-owned firms means that direct competitors rarely meet. For the Cornwall pilot this is more of a concern, and one that cannot be entirely overcome by changes to the design, not least because participants *want* to meet like-minded businesses. One way of tackling this is continuing to pay careful attention to the selection of businesses in individual Action Learning Groups.
- The data available does not enable an assessment of how far participants made use of more than one activity and so we do not robustly determine if people are 'pulled through' from the lighter touch activities to the more in-depth learning activities. There is some data suggesting multiple CN activity use in the NW with interviews also suggesting that in the NW there was a greater understanding that individual programme elements were part of a larger programme with other potentially beneficial activities. This was less the case in Cornwall.

### **Is the programme generating its expected benefits? / What has been achieved to date?**

- The pilot programmes have only been in place since early 2018 in Cornwall and early 2019 in the NW. Both are still in progress too, and while it is rather soon to determine if the activities





have led to longer-term outcomes and impacts, there is some evidence of benefits having been generated.

- The majority of interviewed participants reported some form of benefit (two-thirds in Cornwall, all in the NW,) across the spectrum from outputs to impacts. The programme mechanisms are not only enabling learning but also leading to changed practices, and actual and potential business performance improvements for a notable number of businesses in each region:
  - As would be expected at this point, most reported effects are reported at the output level. At least half the participants reported improved knowledge and confidence in how to improve their business, with a much greater effect in terms of improved knowledge reported in the NW (87% of participants)
  - A little under half (47% in the NW, 42% in Cornwall) of participant interviewees reported having already made changes to their businesses
  - A lower proportion reported having already achieved business performance improvements (20% in the NW, 13% in Cornwall)
  - Importantly, 30-40% of interviewed businesses anticipate making changes (27% in the NW, 38% in Cornwall) and around 30% expect to see future improved business performance.
- We identified a small number of examples where businesses achieved significant business benefits, such as a family-owned business in the NW that introduced new measures to encourage incremental management improvements that have already resulted in £600,000 of savings across the business.
- Businesses of all sizes seem to benefit from the programme and there is no strong evidence of a link between the size or sector of a firm and benefits achieved to date.
- In Cornwall (and to a lesser extent the NW), the likelihood of seeing benefits from pilot participation appears to be more dependent on the attitude and mindset of the individuals participating. Often more junior staff, with limited managerial experience (and possibly more to learn) were more enthusiastic, as were managers in small and medium sized businesses where there is a greater ability to free-up time to participate. However it might also suggest that 'offer' isn't quite right for owner-managers of smaller firms.
- The sample is also too small to draw robust conclusions about the relative effects of different activities, but the qualitative evidence suggest that the more in-depth activities (action-learning in Cornwall and Advisory Boards in the NW), were particularly valued by interviewees.
- **Additionality:** in the NW, interviewees attributed a high proportion of benefits directly to their pilot involvement, pointing to a successful pilot programme - one that has been well-designed, well-targeted and delivered effectively. The results for Cornwall are more concerning as the additionality is rather low, with only around a fifth of participants reporting a reasonable level of effect over and above what would have occurred without the programme, although there is some evidence that the programme accelerated business changes.
- In Cornwall, business performance improvements have typically involved finding new customers or suppliers via the programme's networking activities directly; while in the NW there was more evidence of learning and skills development and applying them to generate performance improvements. This suggests that the hospitality businesses in Cornwall are responding to the programme, and presumably to their wider business context, in a much more short-term and transactional manner than in the NW where there is evidence of learning and longer-term mindset changes.



## Sustainability

- In the NW there is more of a sense of the pilot having helped create a network - half the interviewees reported feeling part of a network while the other half were optimistic about making lasting contacts. In Cornwall the picture is less positive, again around half expect to continue interacting with the businesses they met, but the other half are more sceptical about the benefits of continued interactions.
- However, even for the NW, it is not clear if any mechanisms are planned by BtB or its delivery partners to stimulate continued interactions or if the premise is that it should, in future, be entirely self-motivated. While we understand that BtB's preference is formed relationships and networks to be self-sustaining, there may be opportunities for BtB to provide support at a much lower level to an existing business support provider to organise networking events or stimulate businesses (via providing some administrative support, for example) to self-organise learning activities.

## Recommendations

The two Collaborative Networks pilots evaluated were intended to be implemented quickly to provide opportunities to trial the BtB approach and enable 'learning by doing' and as such we make recommendations as to the continuation of the pilots themselves and for wider roll-out.

### The current pilot programmes

- **The NW pilot** appears to have reached a point where finding new members of its target audience of family-owned businesses is increasingly more difficult. The time and resources needed to recruit many more members of this target audience may not be proportionate to the benefits. Therefore we recommend that BtB works with the local delivery partners to identify (i) how more family-owned businesses might be identified and reached; (ii) if there are additional needs and new support services that could be delivered in the region to businesses already assisted (while being cognisant of state aid rules); (iii) any light-touch support that might be needed to maintain the new networks established. If none of these avenues are likely to generate many more clients, then BtB may wish to consider using alternative or additional delivery partners that could offer reach into new locations and/or new businesses.
- We understand that relationships between BtB and some of its delivery partners in the NW have not always been smooth. However, as the evaluation has found that working with local delivery partners is an effective and efficient way of identifying needs and recruiting participants, it is important to understand what underlies the problems encountered. Therefore we recommend a post-pilot review with delivery partners that focuses on learning and how to improve relationships in future versions of the programme.
- **In the Cornwall pilot** the additionality of the benefits created to date appears to be low. However, personnel changes have led to a revised approach to the pilot - to participant recruitment and the nature of masterclasses in particular. As these changes only came into effect in November 2019 they were not tested by the evaluation. We recommend another short review in several months' time to assess whether the pilot's additionality has improved since the November 2019 relaunch.
- The pilot was launched in Cornwall on the basis of existing institutional links and an opportunity to kick-start a pilot and to quickly start learning 'what works'. BtB have the intention to scale-up activity in the hospitality sector in other regions and the current pause in activity in the sector caused by COVID-19 provides BtB with an opportunity to work with



local and national hospitality experts<sup>1</sup> to better understand how to best support the sector (what its needs are, the most appropriate mechanisms for support, filling gaps in existing support) and determine whether the Cornwall pilot needs modification and how best to deliver to the sector in other regions.<sup>2</sup>

## **Wider roll out of Collaborative Networks**

### Market research - look before you leap

- The NW pilot demonstrates that Collaborative Networks can be beneficial and therefore there is the potential for wider roll-out. However we recommend that BtB considers the following before doing so:
  - Continue to focus on a specific sector or type of business such as family-owned businesses in each region. As already noted, businesses feel they can learn more from other businesses if these businesses have similar aspirations, experiences, or concerns. The NW pilot has shown 'similar' businesses do not have to be in the same sector and the Cornwall pilot has shown that businesses from the same sector are willing to come together to learn. However, working in the same sector does create the challenge of balancing similarity of businesses to ensure relevance of learning with the unwillingness to share information with potential competitors. Any sector-based delivery models need to be carefully designed and operated with sensitivity.
  - Conduct market research and local consultation before starting a pilot to determine: which sectors predominate and/or need help; what local needs are; what business support services are already available and who delivers them; and therefore how BtB might fill gaps in provision and partner with local bodies. In some regions business support is a rather crowded space<sup>3</sup> and there is no benefit in duplication. When working sectorally, it may be worth consulting with national trade bodies as they are acutely aware of the challenges their sectors face.

### Programme design

- The evaluation does not provide strong evidence to suggest that any specific activities are better than others. To a large extent, it is about bringing the right people together to interact and learn from each other. When designing further local versions of the Collaborative Networks programme, we recommend that BtB should ensure that:
  - There is a balance of lighter touch and more in-depth learning activities, with the former providing an opportunity to bring people into the programme, as well as providing an opportunity to identify those individuals and businesses that might benefit most from the more in-depth activities.
  - Sufficient effort is put into identifying appropriate experienced business leaders to lead knowledge sharing and learning activities
  - Ideas on designing knowledge sharing and learning activities is shared across Collaborative Networks to widen the pool of potential offerings (e.g. Advisory Boards, tools and techniques that increase effectiveness of peer-to-peer learning methods, etc.)
    - designs that are in-depth but relatively short in duration are most popular with businesses

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<sup>1</sup> Such as UK Hospitality <https://www.ukhospitality.org.uk/>, the SW tourism alliance <https://www.tourismalliance.com/details.cfm?p=md&id=77>

<sup>2</sup> We understand since the completion of the fieldwork for this study in early 2020, BtB has begun interacting more with sector specialists, particularly to inform programme delivery.

<sup>3</sup> LEPs, Enterprise Zones amongst others



- Where appropriate, alumni from other Collaborative Networks are involved in programme delivery
- They are aware of other local services to signpost businesses to if/where Collaborative Networks programme is unable to provide the support they need
- They consider what activities, if any, are necessary to facilitate the sustainability of the networks created.
- Collaborative Networks should remain as a series of locally focussed interventions where SME leaders can physically meet other businesses (when the COVID-19 situation allows for this). The appropriate geographical scale for planned interventions should be considered and selected on a case by case basis. It also needs to consider how to reach a sufficient number of relevant businesses to create suitable learning communities but at the same time, how to create sufficient geographical proximity to allow for face-to-face networking and increase the likelihood of the creation of a self-sustaining community.

#### Programme management

- Implement processes to capture data on programme participants. This may require the inclusion of data capture in contracts with delivery partners. Data collection will, of course have to be GDPR compliant. At minimum the data required are: the individual's name, the business name; which activities they participated in and when they participated. However more detail can also be captured (and stored) such contact details; number of employees; turnover. It would also be helpful to know how each participant came to hear about the programme, and whether they were signposted to wider CN activities when attending another CN one.
- Evaluations are increasingly using secondary sources of data (business databases) to track the performance of those accessing publicly funded businesses support and therefore details of business characteristics are needed less frequently. The business name (and ideally their Companies House ID number) is all that is required. Nevertheless it is much more helpful to have individual contact details and an opt-in agreement to future evaluations to enable the future qualitative data collection - particularly where there are many micro-size businesses amongst the participants.



## 2 Introduction

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Be the Business (BtB) has appointed Technopolis to carry out a process evaluation of their Collaborative Networks programme. It looks primarily to test how the programme, in its early phase, has delivered against its aims and objectives, and what lessons can be learned to help improve future programme delivery and performance both within the pilots and wider roll-out to other regions. A secondary focus of the programme is also to determine the early programme impacts on participants, and any barriers or facilitators which again can inform future programme delivery.

### 2.1 Evaluation objectives

With the agreement of BtB, this study aims to answer six core evaluation questions, both for each respective pilot, and for the CN programme as a whole:

1. How does the programme design aim look to improve outcomes for its target audience?
2. Is the programme reaching its target audience?
3. Which elements of the programme are most effective?
4. Has the programme helped improve information and knowledge diffusion?
5. Is the programme helping improve skills and capabilities amongst business leaders?
6. Is the programme helping improve business performance and productivity?

For reporting purposes we have considered the final three together as part of overall commentary on the benefits and outcomes achieved.

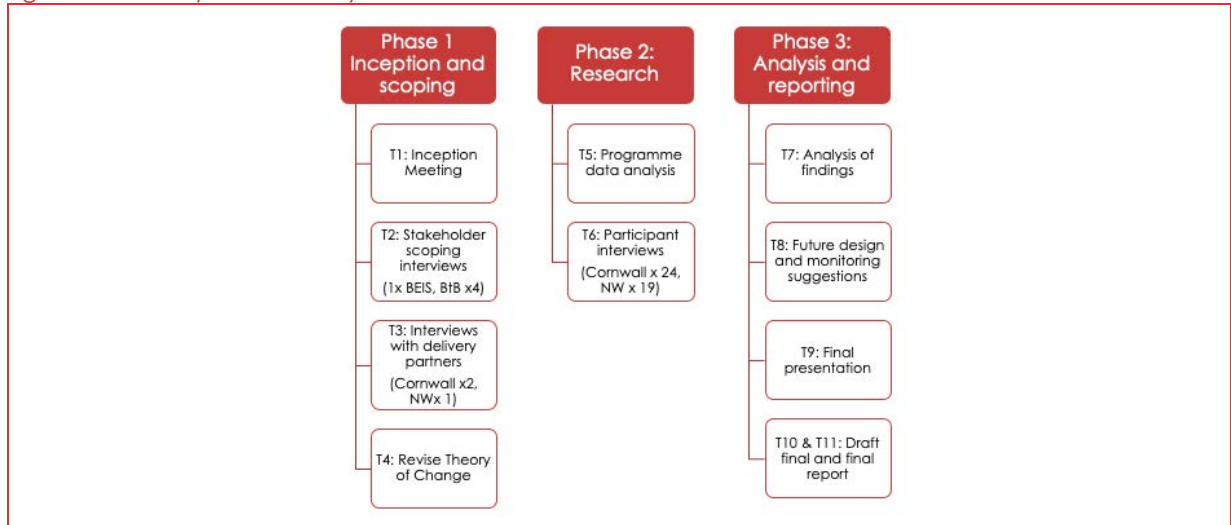
### 2.2 Summary of evaluation methodology

We have adopted a mixed method approach to this evaluation, as summarised below in Figure 1. It is rooted in an extensive interview programme encompassing stakeholders (both within Be the Business and from BEIS), delivery partners, and participants from the two pilots. The interviews with the first two groups were largely qualitative in nature. For participant interviews, the core evidence base for this study, we also collected quantitative data on their programme experiences, and any outcomes and impacts generated to date, using a bespoke interview guide for each pilot. For both pilots, BtB compiled a list of potential interviewees based on those that they believed had engaged most with the respective pilots (the assumption being that those who had engaged most would be best placed to provide meaningful pilot and programme feedback). Following agreement with the client group, we agreed to undertake a minimum of 40 interviews with at least 15 coming from Cornwall and 10 from the North West. In total, the study team completed interviews with:

- 24 individuals in Cornwall, having sent invitations to 93 (a 26% response rate)
- 19 individuals in the North West, having invited 66 (a response rate of 28%)

The appendices provide further details on the methodology and the research tools used for this study.

Figure 1 Workplan summary



Source: Technopolis

We have triangulated the findings from these with programme data analysis, as well as drawing from our knowledge and experiences of best practice in other business support initiatives.

### 2.3 This report

The remainder of this report is as follows:

- **Chapter 3** provides an overview of the **whole programme**, including its theory of change
- **Chapter 4** examines our findings from the **Cornwall pilot**
- **Chapter 5** analyses the situation in the **North West pilot**
- **Chapter 6** brings together the findings from both pilots and presents overall **conclusions and recommendations**

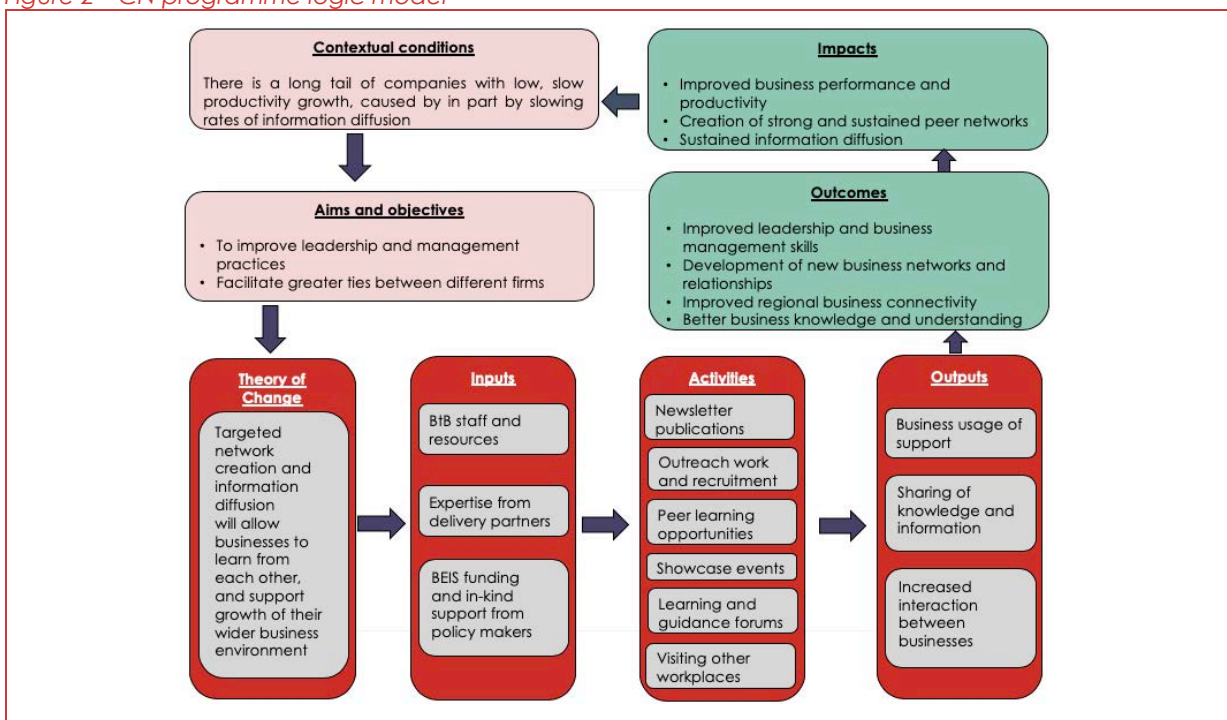
### 3 The programme

#### 3.1 Programme background

The Collaborative Networks programme has its roots in a 2015 report by the Productivity Leadership Group, a group of 14 senior business leaders who came together to more closely examine the issues behind the UK's lacklustre productivity, and to come up with ways of tackling it. Their report highlighted that relatively simple management changes can boost productivity but a lack of collaboration and knowledge diffusion amongst UK businesses, SMEs in particular, meant that many businesses were often not aware of the steps they could take to improve. It also emphasised the importance of businesses working together to identify their own strengths and weaknesses, to see and share best practice with one another, and providing mutual support to make necessary improvements to business management.<sup>4</sup> Ultimately, lots of small businesses making modest improvements will have a considerable impact on UK productivity.

In light of this, Be the Business had developed an idea for a new business support programme, the Collaborative Networks (CN) programme. This was designed to encourage business leaders to work together so that they could “learn, share, build on their strengths and perform at their peak.” As shown by the programme logic model below (Figure 2), drawn from programme documentation and stakeholder interviews, the CN programme introduces a variety of different targeted activities designed to enable network creation and information diffusion within a geographical region. This support aims to encourage knowledge sharing which will ultimately improve individual business performance. This in turn will translate into improved productivity and local economic performance.

Figure 2 CN programme logic model



Source: Technopolis analysis

<sup>4</sup> Productivity Leadership Group (2015) *How good is your business really? Raising our ambitions for business performance*, p.4. <https://www.bethebusiness.com/wp-content/uploads/2018/04/how-good-is-your-business-really.pdf>





### 3.2 Cornwall pilot

Through their existing contacts, BtB was offered a chance to work with the Cornwall hospitality sector and saw this as an opportunity to pilot their CN programme approach. Consequently, in early 2018, BtB launched the Cornwall Hospitality Leaders Network (later renamed the Collaborative Networks Programme for Hospitality). Its aim was to establish a brand new network of hospitality businesses across Cornwall with a view to giving those participating the time and tools to meet, share experiences, and learn from each other. The Networks has offered a diverse range of support including masterclasses from industry leaders, peer groups, and business awards.

### 3.3 North West pilot

In 2019, BtB extended their CN approach to the North West. Rather than building a new pilot programme from scratch, BtB opted to introduce the pilot via delivery partners already operating in the region, the NW Business Leadership Team in particular. After canvassing the views of influential figures in the region, BtB decided to work with family businesses and test the effectiveness of cross-sectoral approaches. As other organisations in the North West were already providing business support services to family businesses, the pilot focused on identifying gaps in existing provision and working with existing partners to fill them. Activities included Business Placements, Advisory Boards, Open Business Days, and Peer Learning Events.

BtB currently plans to expand the CN approach into other areas too, including Buckinghamshire. Current debates around programme implementation include the types of activity the Buckinghamshire pilot should run, to should extent it should rely on local partners for client recruitment and activity delivery, and what sectoral focus, if any, the pilot should have.

The next two chapters provide more detailed commentary on each of these pilots and how the programme has fared in the two regions. We present each section is presented in terms of six evaluation questions (as in Section 2.1)





# Cornwall Pilot



Barefoot Media

## 4 The Cornwall pilot

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### 4.1 How the pilot looks to improve outcomes

#### 4.1.1 *The theoretical framework*

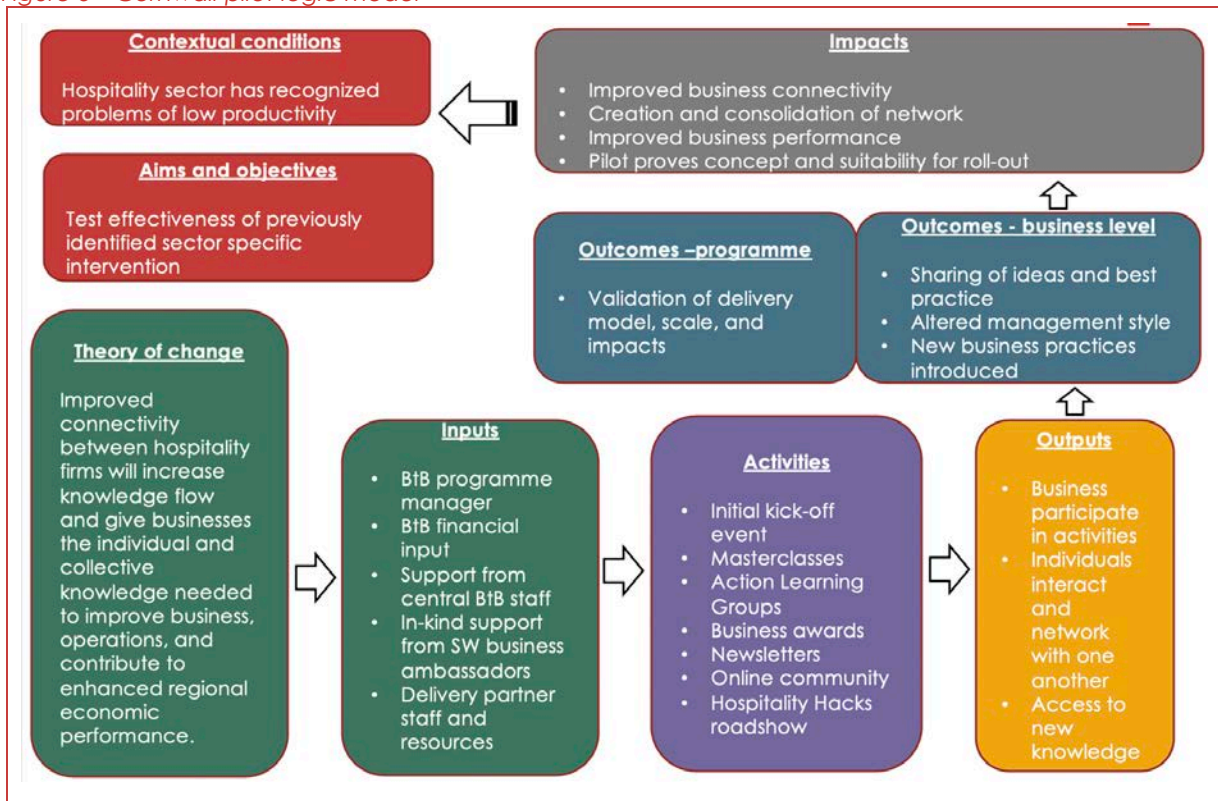
The Cornwall pilot sought to address the low productivity within the area's hospitality sector. As highlighted in the logic model below (Figure 3), the pilot seeks to run a variety of events and activities which are intended to connect hospitality businesses and encourage them to share knowledge with, and learn from, each other. With this knowledge and learning, it is hoped that the businesses can improve their own performance, and in turn, the overall performance of their sector and the regional economy. This is especially pertinent to the hospitality sector which traditionally has had low levels of productivity.

This highlights a need for some intervention to improve productivity in Cornwall's hospitality sector. BtB already had a detailed logic model for an intervention they felt would be appropriate, outlining how planned inputs translated into activities, then outputs, and then outcomes and impacts. However, this logic model still not present the logic model's links to underlying contextual conditions and the rationale for intervention. We have brought these together in summary form in Figure 3. In developing this from interviews and a review of programme documentation, we have not found any evidence of BtB undertaking any thorough research or information gathering to determine that this planned intervention was the most appropriate intervention, both in terms of activities run or the beneficiaries targeted. BtB did not design the Cornwall pilot specifically to tackle the underlying contextual conditions in the region and sector, but rather to more generally test the effectiveness of a number solutions to networking and peer learning<sup>5</sup>. By responding to an opportunity to work in the region, it appears that BtB to some extent reverse-engineered a pre-designed pilot to fit local circumstances, rather than designing an intervention around local needs. Nevertheless, as Figure 3 shows, even with this retrofitting, the pilots is still working to produce impacts that directly address the underlying contextual issue of low productivity in Cornwall's hospitality sector.

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<sup>5</sup> As illustrated by the lack of a direct flow between the 'contextual conditions', 'aims and objectives' and 'theory of change.'

Figure 3 Cornwall pilot logic model



Source: Technopolis analysis

Fundamental to ensuring the success of this pilot, or any networking-based intervention, is involving individuals that are willing to share relevant information with each other. Feedback gathered from stakeholders and beneficiary businesses found that individuals are more likely to access information relevant to them when they are meeting like-minded businesses. It is clear that BtB has considered this in its pilot design. As outlined in further detail below, as part of its Masterclasses programme, BtB has looked to recruit a number of notable figures from the hospitality industry, including some (not exclusively) local to Cornwall, who they believe bring shared philosophies or experiences to pilot beneficiaries. In practice, identifying 'like-minded businesses' for beneficiaries is difficult, the definition of 'like-minded' appearing very much to be in the 'eye of the beholder'. For some businesses this means interacting with other businesses very close to their own (e.g. of a similar size and operating in Cornwall), while others take a much broader view.

Stakeholder and beneficiary business feedback also indicated that individuals are more likely to share information with each other in instances where they are not mixing with their direct competitors. Again, BtB has considered this carefully in its pilot design, especially with the Action Learning Groups (described in greater detail below), specifically selecting firms for each group that are not direct competitors are not working with each other.

#### 4.1.2 Pilot implementation

Programme activity, has focused on three core offerings (detailed below). We have found little evidence of any systematic or comprehensive market testing of these three core offerings, akin to what the North West pilot conducted. There was some element of market testing, BtB asking Cornwall hospitality businesses what subject areas they would most welcome support in, and what they might find useful. However, this exercise was not as systematic as the market review for the North West which tested the demand and need for the specific programme offer.



Instead, the Cornwall pilot adopted a 'learning by doing' approach making changes to recruitment strategies and delivery approaches in November 2019 in light of feedback in the previous stages of the pilot.

Below, we outline the three core elements of the Cornwall pilot. Please note that attendee numbers for each are based on the partial monitoring data that BtB holds and is unlikely to reflect the true number of individuals benefiting.

- **Masterclasses:** these are topic-focussed working sessions which combine networking opportunities with a talk from an industry expert. BtB's masterclass delivery model has changed over time. Previously, sessions lasted 2-3 hours and involved some short networking, a talk from a notable hospitality expert from outside Cornwall, and group work aiming to apply learnings and to stimulate peer-to-peer collaboration. Now, the masterclass model involves running half-day sessions involving a keynote presentation, scenario-based group work, networking lunches, and case study sessions involving roundtable discussions led by an industry leader. Each masterclass centres on a central topic, selected by BtB. BtB has also been responsible for identifying keynote presenters and roundtable leads. It has recruited a number of different individuals for these, recognising that beneficiaries have different preferences on who they wish to interact with. For instance, keynote speakers have included local hospitality business leaders (including of larger businesses), consumer relations representatives from a major airline, and hospitality businesses based outside Cornwall.

Over the evaluation period BtB ran five masterclasses covering: business planning; leadership and strategy; boosting revenue; employment engagement and customer experience. BtB recruited attendees for these, drawing on social media and an existing contacts database. Programme monitoring data indicate that 175 individuals attended at least one masterclass, and 13 attended more than one. Attendee numbers for each masterclass were as follows:

- Leadership & strategy – 53
- Business planning – 42
- Boosting revenue – 13
- Employment engagement – 63
- Customer experience – 21

- **Action learning groups:** these are facilitator-led small group peer mentoring sessions, covering topics which the group itself wishes to discuss. Participants sign up to take part in the Action Learning Groups, with BtB allocating each one to a group based on each business' profile. It has taken particular care to ensure that group members complement each other and in particular, do not direct competitors in the same group as each other. While BtB has overseen recruitment, it has appointed external delivery partners<sup>6</sup> (Oxford Innovation and John Heywood), to manage and facilitate each session, the ultimate aim being for each action learning group to become self-sustaining and be able to conduct meaningful meetings without an external facilitator in the future.

To date, the pilot has run two separate groups that meet monthly. Programme data indicate that 26 individuals have attended the action learning groups although not all of these have attended every session

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<sup>6</sup> Through an uncompetitive tendering process – both partners were already known to BtB.

- Hospitality Hacks roadshow:** this was a bus tour that visited Padstow, Newquay, St Ives and Falmouth, providing an opportunity for local businesses to share and showcase their hacks (a tip or novel solution designed to help raise productivity, e.g. coffee granules as soil fertiliser, to hosting days out to motivate their team) for the hospitality sector in advance of the peak tourist season. In total, During the roadshow, beneficiaries were also able to enter their hacks to the *Hospitality Hacks Cornwall Awards*, providing a further opportunity to showcase their work. Programme monitoring data indicate that 98 individuals participated in the roadshow, while via the roadshow, Be the Business received a total of 200 hospitality hacks.<sup>7</sup>

In addition to these core activities, the pilot ran a number of supplementary events, as outlined in Table 1.

*Table 1 Supplementary Cornwall pilot activities*

Activity	Further details
Online activity	<ul style="list-style-type: none"> <li>In the pilot's early phases, BtB trialled a closed Facebook group</li> <li>Pilot monitoring data recorded seven users of this community, although we believe the data to be incomplete and the real figure to be higher</li> </ul>
Launch event	<ul style="list-style-type: none"> <li>This pilot launch event included sector-specific speakers, local influencers, and a chance to interact with BtB staff</li> <li>The Launch event also provided tasters to different learning activities</li> <li>It provided opportunities for businesses to provide feedback on what they wanted in a programme</li> </ul>
Cornwall Tourism Award	<ul style="list-style-type: none"> <li>BtB sponsored the Business Leaders of the Year Award at the Cornwall Tourism Awards</li> <li>BtB paid for five individuals to have a table at this event</li> </ul>
Newsletter	<ul style="list-style-type: none"> <li>The pilot has a monthly newsletter with total of 484 on the mailing list</li> </ul>

Source: Stakeholder interviews and Technopolis analysis of pilot monitoring data

<sup>7</sup> <https://businesscornwall.co.uk/news-by-industry/awards/2019/02/best-hospitality-hacks-revealed/>

### Summary - How does the Programme look to improve outcomes for its target audience?

- The pilot aims to provide activities that facilitate networking and knowledge diffusion amongst Cornwall's hospitality sector. Doing so is meant to create self-sustaining networks, and improved connectiveness between firms
- Central to BtB's adopted model is an assumption that participants are willing to share information with each other
- The model also assumes that any information shared is relevant to the business needs of local hospitality businesses. BtB has attempted to do this by aiming to bring like-minded businesses together, but this definition of 'like-minded' appears to be very subjective. For some businesses, this means interacting with firms very similar to their own (e.g. of a similar size and operating in Cornwall), while others take a much broader view
- Feedback from delivery partners also indicates that information sharing is more likely where firms are not mixing with direct competitors. BtB has actively organised its activities to ensure that competitors do not directly interact with one another
- In response to these challenges and assumptions, the Cornwall pilot has primarily used three activities to encourage knowledge sharing between businesses: masterclasses; action learning groups, and a hospitality hacks roadshow

### Delivery implications

- The Cornwall pilot would benefit from a clearer assessment of the market and business need (as happened for the North West pilot) to ensure activities are designed to meet needs in practical ways. BtB has already iterated its delivery approach following early feedback. Market assessments could help inform future iterations
- Linked to this, for its masterclasses, BtB should continue to check with intended beneficiaries whether they would value involvement from non-Cornish businesses
- Market analysis should be undertaken before roll out of the programme in other regions to ensure there is a need for BtB involvement, and that it implements activities which meet local demand

## 4.2 Reaching the target audience

### 4.2.1 Who was the target audience?

As highlighted through discussions with BtB stakeholders, the Cornwall pilot has primarily targeted business leaders in SMEs operating within Cornwall's hospitality sector. The pilot has not operated any hard exclusion criteria, although some at BtB have worked under the hypothesis that relative to micro-businesses, business leaders within small businesses will be able to get more out of pilot participation – the extra staff meaning that small business leaders have greater leeway to dedicate time to attending BtB events. They also have more scope to focus on business management, having staff in place to take care of day-to-day operations.

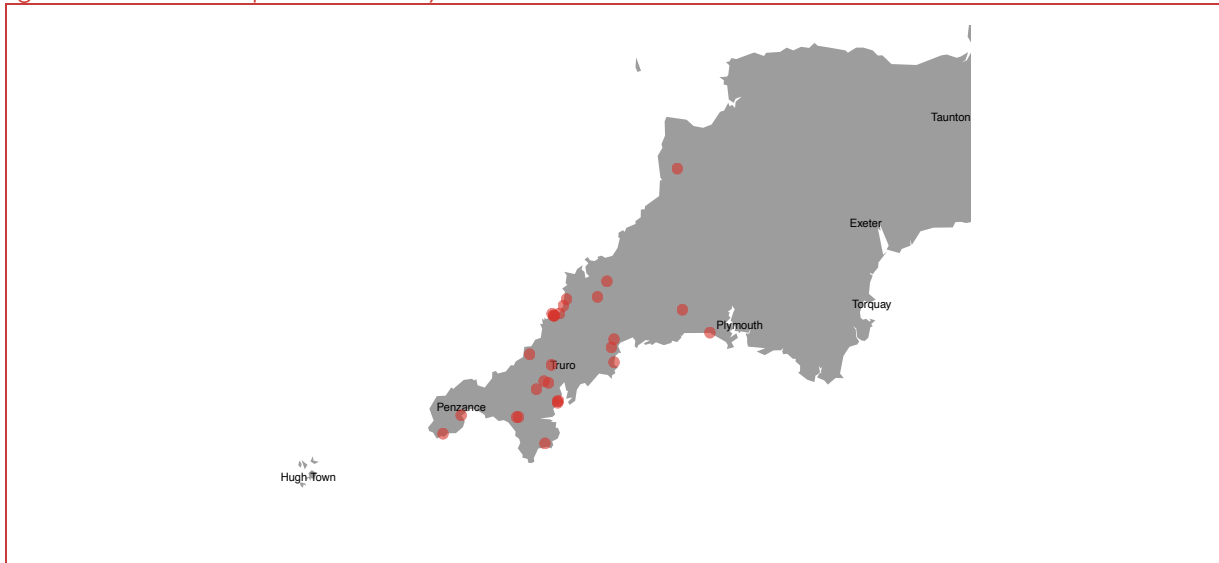
### 4.2.2 Did the pilot reach its target audience?

Programme monitoring data indicates that the pilot supported 331 individuals from 259 businesses. The partial nature of this data means that we can only make limited assertions on whether the pilot has reached the target audience outlined above.

Figure 4 shows that geographically speaking, the pilot reached its target audience with all beneficiary businesses being Cornwall-based. Beneficiaries were clustered in the south-west of the region, largely around major urban tourist centres such as Truro, St Austell and Newquay although some also came from the very north and very east of the region.



Figure 4 Location of pilot beneficiary businesses



Source: Technopolis analysis of programme monitoring data

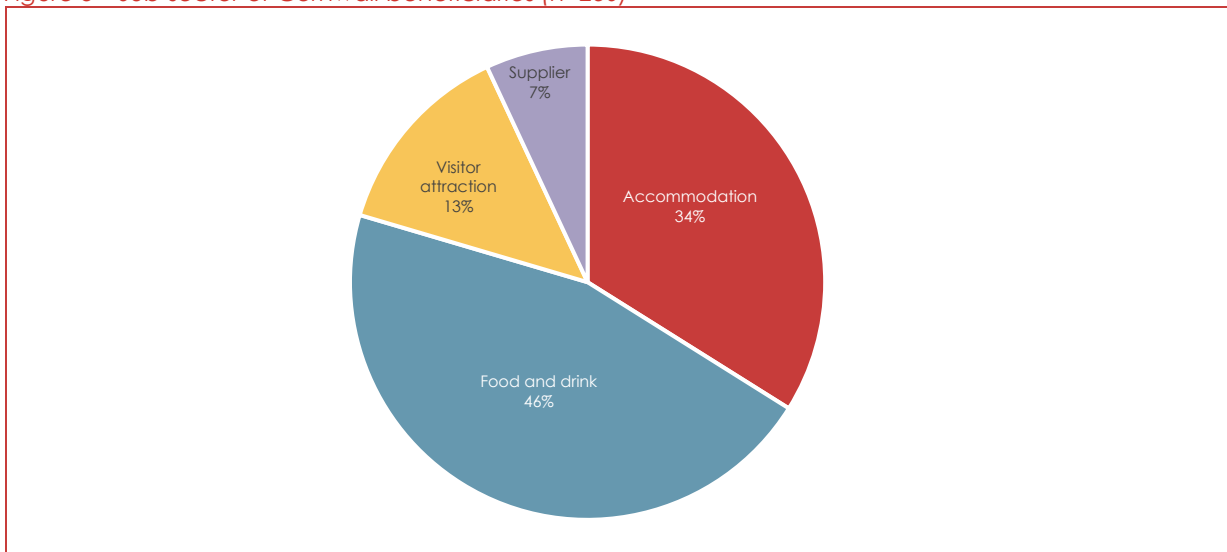
Data on firm size was available for 72 of beneficiaries (just 28% of the total). Of these, 51% worked for micro businesses (0-9 employees), 26% were small (10-49 employees), 11% were medium (50-249 employees) and 11% were large. To that end, the pilot has largely reached its target audience, albeit that it has attracted some large businesses too. Furthermore, BtB may want to ensure that micro-businesses are directed towards less time-intensive activities (e.g. masterclasses), reserving the more intensive ones (e.g. Action Learning Groups) for the core audience<sup>8</sup> from whom the returns are likely to be greater. Alternatively, BtB may wish to ensure that micro-businesses involved in the programme have significant growth plans and be looking to become a small business in the short term.

The final characteristic of the Cornwall Pilot target audience was sectoral-based. Our study of the partial data available indicates that BtB has recruited hospitality firms exclusively. Separate data for 230 beneficiary businesses shows the hospitality sub-sectors that the pilot successfully reached. As Figure 5, shows, nearly half the beneficiaries (46%) worked in food and drink and just over a third (34%) worked in accommodation.

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<sup>8</sup> This is based on the continuing principle, as highlighted in stakeholder discussions, that participant time-intensive activities such as Action Learning Groups are better suited to leaders of small businesses (the core audience) because they will be less involved in day-to-day running of the business and can therefore dedicate more time to attending events, as well as having the authority to make changes to the business.

Figure 5 Sub-sector of Cornwall beneficiaries (n=230)



Source: Technopolis analysis of pilot monitoring data

#### 4.2.3 The mechanisms and nature of audience engagement

Beneficiary interviews provided insights into the ways that BtB successfully recruited participants and engaged them in the programme. In terms of becoming aware of the CN pilot programme: seven of the 24 interviewees (29%) stated that they came across the pilot through signposting by Visit Cornwall, a local tourism trade association. This demonstrates the importance of BtB drawing on links with key local partners. Another seven interviewees became aware of the pilot via referrals from colleagues. Other recruitment channels came directly from the BtB's own work, e.g. the Hospitality Hacks Roadshow, and their representation at the Cornwall Tourism Awards.

While BtB has clearly found some effective recruitment channels, these channels have not led to widespread or in-depth knowledge about the wider CN programme or its objectives. Of the 24 beneficiaries interviewed, four (17%) explicitly stated that the programme aims were unclear. Some interviewees knew superficial and/or limited information about the programme aims. In an answer to an open response question, eight believed that CN aimed to encourage interactions between businesses while eight also thought the pilot was about facilitating knowledge sharing. However, in-depth interviewee knowledge of the programme's aims, and that CN comprised a suite of activities was far from universal. This raises question marks over the effectiveness of BtB beneficiary engagement, with interviewees lacking in but a superficial understanding of the programme's activities, structure, and aims. Some interviewees also commented on the Cornwall pilot's social media presence being very limited, and lacking in up-to-date details, emphasising the need to improve audience engagement activity.



### Summary – Is the programme reaching its target audience?

- The pilot's target audience are Cornish hospitality SMEs
- According to the (partial) monitoring data available, the pilot has successfully reached all three groups within this target audience – firms in Cornwall, and firms in the hospitality sector, and SMEs (albeit that it has also supported some large businesses)
- The pilot has attracted a large proportion of micro-businesses – an unsurprising situation given that we understand they make-up many firms in the Cornwall tourism sector. While they may still benefit to some extent from the pilot's activities, they are likely to generate lower levels of return for BtB relative to larger SMEs.
- Existing recruitment channels appear to be effective, especially referrals from the Visit Cornwall tourism association. Basic programme knowledge has also spread across the region by word of mouth. However, participants' knowledge of the programme tends to be limited, only being aware of single programme elements (rather than it being a suite of activities), and lacking a comprehensive understanding of programme objectives.

#### Delivery implications

- BtB should consider how to target larger SMEs (i.e. non micro-businesses) to ensure the programme reaches those who can benefit the most.
- The pilot will benefit from clearer promotion of the whole programme offer as part of its audience engagement work, and when delivering, specific events and activities.

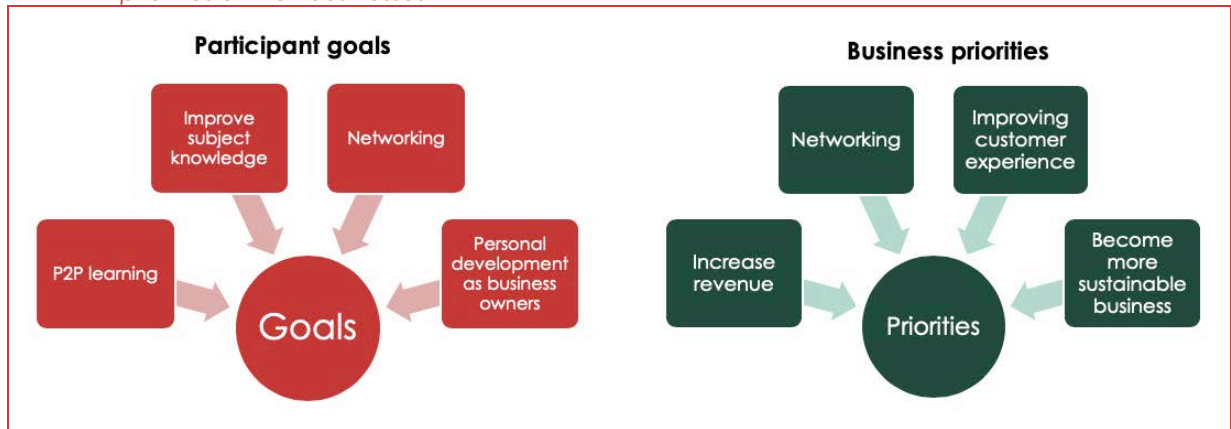
## 4.3 The effectiveness of the different activities

### 4.3.1 Participants' goals

Key to ascertaining the programme's effectiveness is better understanding what participants hoped to achieve from their programme involvement. Participant interviews have helped reveal what individuals were typically hoping to achieve from their participation in the pilot. Figure 6 summarises the main responses seen, but for many, their involvement centred on learning from others about how to manage specific issues of their business and/or how to increase revenue. For others, the emphasis was more around more general networking, and improving their knowledge on specific topics (cited examples from beneficiary interviews included marketing through social media, company website development and other digital skills, and time management). Nevertheless, a number of participants did not have specific outcomes in mind when joining the programme. Instead they were looking to take time to develop their skills and confidence.

Interviewees also set out the current priorities for their businesses. They provided a diverse set of goals including improved sales, customer experience, and business growth. In the main, business priorities centred on increasing revenue and productivity through aspects such as diversifying their business offer, increasing spend per head, and increasing and retaining the customer base. Several accommodation providers also spoke of wanting to increase occupancy levels in quieter months, and in finding ways to improve the quality of their offer. Figure 6 sets out other priorities for interviewed businesses.

Figure 6 Summary of what participants were looking to achieve from programme involvement, and the priorities of their businesses

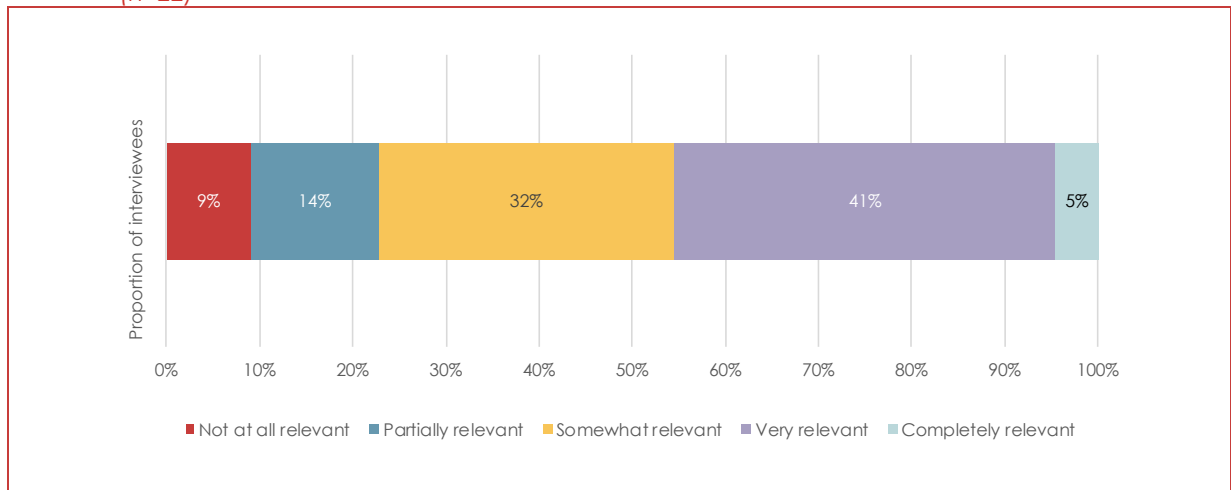


Source: Technopolis analysis of participant interviews

#### 4.3.2 How far did the pilot help participants reach these goals?

Overall, interviewed participants believed that the pilot's activities as a whole were well-run and professional, based in good locations and with good speakers. As shown in Figure 7, 16 of 22 interviewees stated that that the programme was either "very relevant" or "somewhat relevant" to their personal and business needs. The CN pilot was particularly helpful in helping meet business networking goals. Of the beneficiaries interviewed, 58% (14 of 24) felt that the pilot had helped them meet businesses 'appropriate' to them. Several interviewees also commented on how masterclasses covered topics and examples relevant to them.

Figure 7 Responses to "How relevant has the programme been for your personal and business needs?" (n=22)



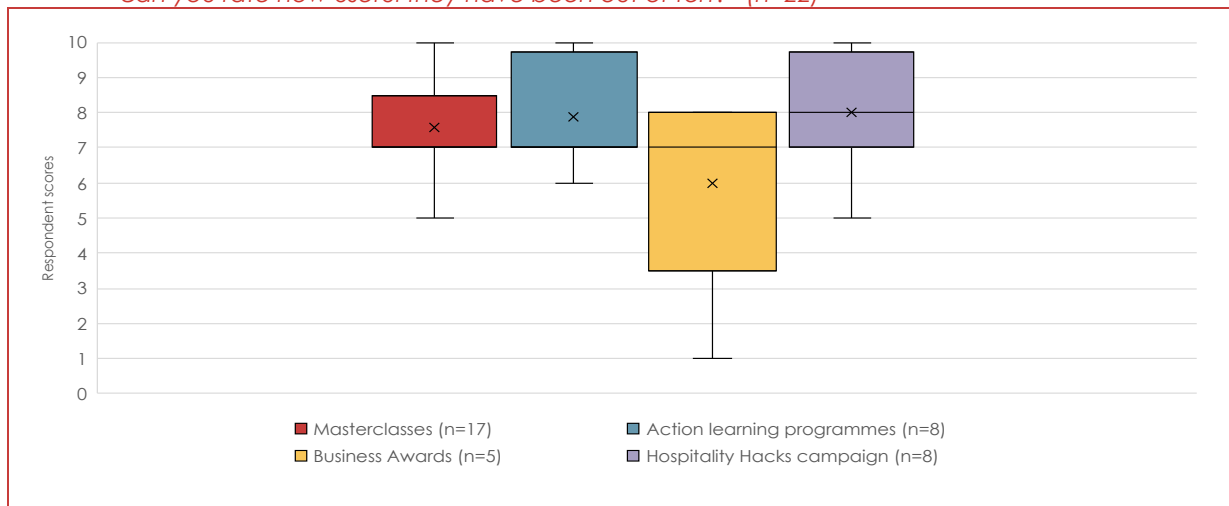
Source: Technopolis analysis of participant interviews

A handful of interviewees (five) indicated that the pilot was only "partially relevant" or "not relevant" to their personal or business needs. The associated comments from these five tended to focus on activity specific issues (the vast majority of those interviewed had only used one of activity types, often just masterclasses) which we describe in more detail below. The entire interviewee group however, provided more overarching comments on issues that prevented the pilot from maximising its effectiveness. These included the time commitment for programme engagement (including travel time across the region) acting as a barrier to continued participation, and activities not always being pitched at the right level for all of its audience

### 4.3.3 The relative effectiveness of different activities in meeting these goals

Interviewees also provided comments on the usefulness of the pilot's different activities. We asked interviewees to rate each activity they participated in out of ten with Figure 8 summarising the results seen. Amongst the interview group, all activities except the business awards<sup>9</sup> were fairly equally well-regarded albeit with a slightly larger range of opinions. However, given the small sample sizes involved, the findings may not necessarily be representative of the views of all participants. Table 2, provides more specific feedback on each activity type from interviewees.

Figure 8 Box and whisker plot<sup>10</sup> of answers to "For each activity that you have been involved in, please can you rate how useful they have been out of ten?" (n=22)



Source: Technopolis analysis of participant interviews. X denotes mean, for masterclasses and action learning programmes, the median is the same as the lower quartile, while for business awards, the upper quartile and maximum are the same.

Table 2 Feedback on the different Cornwall pilot activities

Activity	Positive remarks	Areas for improvement and learning points
Masterclasses	<ul style="list-style-type: none"> <li>Breadth of speakers invited and wide range of participants</li> <li>Well-run sessions, with collaborative exercises, break-out groups, good tools used (ex. of postcard with development goals) and good visuals</li> <li>Useful Q&amp;A session between speakers and participants</li> <li>Effective sharing of knowledge</li> <li>A delivery partner noted that BtB learnt lessons from previous masterclasses to improve the running of the sessions</li> </ul>	<ul style="list-style-type: none"> <li>Content and language of the sessions not always relevant to the businesses attending – described as "overcomplicated" and "not easily transferable to SMEs and hospitality" (this point was expressed also by one delivery partner). Others suggested that the session were pitched at too low a level for them.</li> <li>Sessions trying to cover too much in one day in not enough detail</li> <li>Participants felt they would have learnt more by engaging with participants from similar businesses</li> </ul>

<sup>9</sup> In some cases, interviewees could not distinguish between the Cornwall Tourism Awards and the Hospitality Hacks awards. Our analysis has therefore considered the two together.

<sup>10</sup> Box and whisker plots summarise five sets of numbers. The box covers the lower quartile to the upper quartile with a solid horizontal line denoting the median. There are two whiskers which go from each quartile to the respective minimum and maximum values.

Activity	Positive remarks	Areas for improvement and learning points
		<ul style="list-style-type: none"> <li>• Break-out sessions would have benefitted from facilitators to help broker introductions to other businesses and from circulation of a list of participants beforehand</li> <li>• The quality of masterclasses appears to have been variable. Some have been well-received but there was one extreme example of another indicating that their masterclass did not provide sufficient value to merit closing their business for half a day to attend.</li> </ul>
Action Learning programmes	<ul style="list-style-type: none"> <li>• Excellent and completely relevant content</li> <li>• Well-run sessions, with facilitators ensuring everyone gets to explain their issue in full before others make suggestions</li> <li>• Breadth of attendants means there are no direct competitors in the same room and participants can speak freely</li> </ul>	<ul style="list-style-type: none"> <li>• The main challenge is getting sufficient numbers of participants attending every session. Small groups lead to repetitive sessions and examples. Oxford Innovation (who lead the sessions) confirmed that they are hoping to get greater richness from new additional members showing up.</li> </ul>
Hospitality Hacks campaign	<ul style="list-style-type: none"> <li>• Interesting topics at the workshops which were part of the Hospitality Hacks roadshow (marketing, search engine optimisation)</li> </ul>	<ul style="list-style-type: none"> <li>• There could be more cross-over with the Business Awards, since examples of hacks could have been given at the awards</li> <li>• Rooms slightly too small for the number of attendants</li> </ul>
Business Awards <sup>11</sup>	<ul style="list-style-type: none"> <li>• Break-out sessions useful and engaging</li> </ul>	<ul style="list-style-type: none"> <li>• More information could be provided to the public at the awards on why winners have won the awards</li> </ul>

Source: Technopolis analysis

To some extent these comments reflect the diversity of businesses reached by the Cornwall pilot (albeit all within the hospitality sector) and, while far from being the views of all participants, they do indicate that pilot can make reasonable efforts to fine-tune event delivery.

Based on the feedback provided, there does not appear to be an optimal balance of more 'formal and structured' networking opportunities<sup>12</sup> and less structured ones. The Action Learning Groups and the Hospitality Hacks were the both highest rated activities, but whereas the former provided a more structured basis for networking, the latter very much provided more informal and ad hoc avenues for companies to meet each other.

<sup>11</sup> In some cases, interviewees could not distinguish between the Cornwall Tourism Awards and the Hospitality Hacks awards. We believe that much of the feedback provided is most relevant to the Hospitality Hacks Awards.

<sup>12</sup> By structured and formal, here we mean activities such as Action Learning Groups which are solely focused to encourage collaborative working, discussions and networking between businesses. In other words, networking is the core function of the activity and delivery is tailored around achieving this. While other activities such as the masterclasses aim to facilitate some networking (e.g. through lunches and roundtable discussions), they do so in a less structured way. While networking is encouraged, it is not necessarily mandated in the same way that is in more formal structured settings like Action Learning Groups.

### Summary - Which elements of the programme are most effective

- Interviewed Cornwall pilot beneficiaries view the pilot as being well-run, having a good range of speakers, and providing opportunities to learn from others as well sharing knowledge with them
- Interviewees on the whole considered the Action Learning Groups and the Hospitality Hacks Roadshow to be the marginally most useful programme elements, albeit that there is little to choose between each of them, and the feedback is based on small sample sizes
- Commonly identified barriers to programme effectiveness by interviewees include continued programme engagement requiring too much of a time commitment, and activities not being pitched correctly for the whole audience
- Individual respondents have provided different areas of improvement for specific pilot activities which could serve as the basis for the fine-tuning of future activity delivery

#### Delivery implications

- In terms of tailoring and targeting future activities in Cornwall
  - Business priorities are to increase revenues and productivity, improve the quality of their offer, and improve employee wellbeing
  - At the individual level, programme participation is driven by wanting to access peer-to-peer learning, networking, and gaining knowledge on specific topics

## 4.4 Benefits and outcomes from the pilot

### 4.4.1 Benefits achieved from pilot involvement

As highlighted in Figure 3, the main intended outcomes and impacts for the pilot were improved knowledge on how to best run their business, altered business management behaviour, as well as improved connectivity between Cornish hospitality businesses. In the longer term, both these improvements would also translate into improved business performance.

As shown in Figure 9 below, interviewees reported a wide range of benefits resulting from their pilot involvement, all of which were aligned to the pilot's objectives. A large proportion reported improved knowledge and capabilities from their programme involvement. A total of 54% of the 24 interviewees felt more confident about improving their business performance, and 50% of the 24 felt more knowledgeable about making business improvements. Examples of new skills acquired included adapting their management approach such as time management, administration, and leadership approaches. Others highlighted how the pilot had helped them understand the importance of taking time out of day-to-day business activities to focus on management instead.

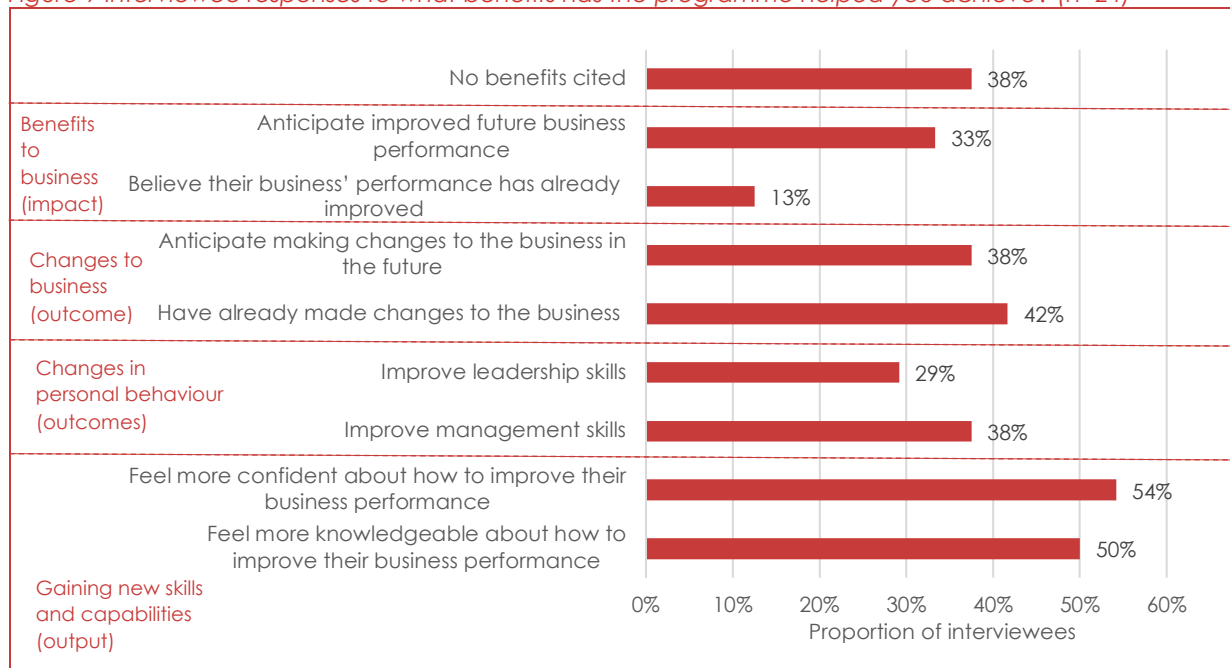
To that end, it is clear that the pilot has helped facilitate information and knowledge diffusion for a considerable proportion of participants, one of the core pilot objectives. A closer examination of the data also shows that there is no link between the size of a firm, and their reporting of feeling more knowledgeable. However, those reporting improved confidence about improving their business tended to be small or medium sized firms.

Only around a third of interviewees reported changes to their personal behaviour following pilot involvement: 29% of those interviewed said they now had improved management skills while 38% said they had improved leadership skills. In both cases, those reporting benefits tended to be small businesses, re-iterating the fact that participants from non-micro businesses appear to be better able to use the new skills and capabilities that the pilot helps provide.



A larger proportion of interviewees (42%) reported having deployed their new knowledge and confidence to make changes to their business, another core pilot objective, while 38% report anticipate making changes. This is a considerable proportion (even allowing for the fact that some of the same individuals will have reported both actual and anticipated changes) for a programme still in progress. Examples of business changes made by interviewed beneficiaries include introducing new approaches to social media and implementing social media and implementing new staff motivation initiatives. However, there were very few cases where interviewees noted the pilot being responsible for them making transformational changes to the business – changes were relatively modest and did not radically alter the operations or future trajectory of the business.

Figure 9 Interviewee responses to what benefits has the programme helped you achieve? (n=24)



Source: Technopolis analysis of participant interviews.

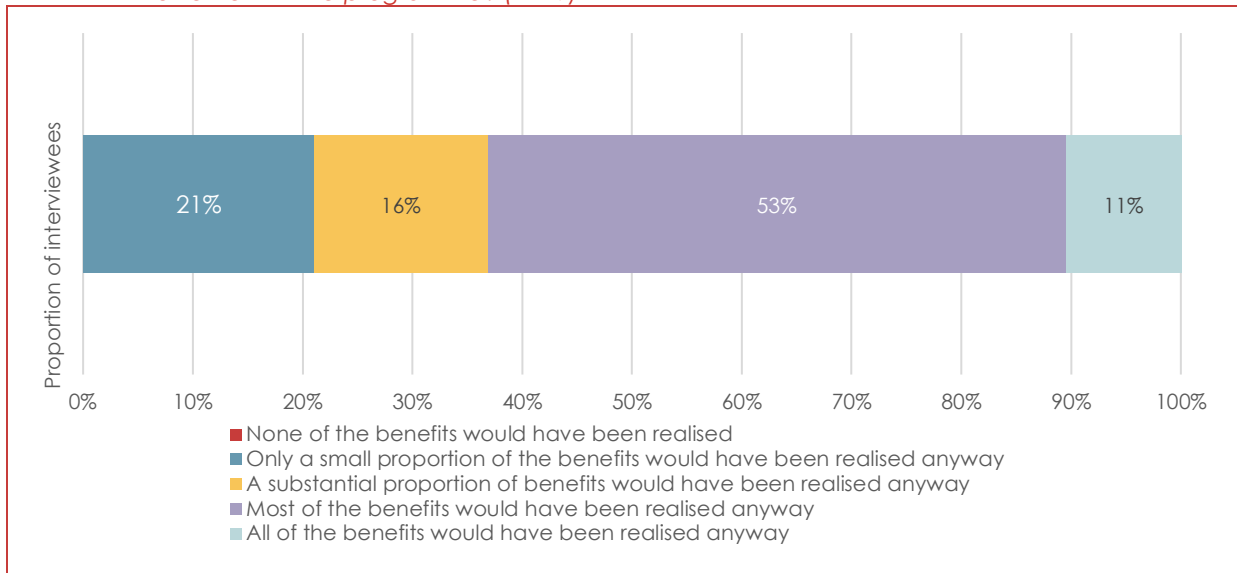
There were few instances reported of business changes having been directly translated into business benefits. Only 13% said that their business performance has already improved since programme involvement. Where this was the case, improved business performance tended to come from finding new potential customers or suppliers. This is unsurprising as the pilot is still in its infancy and it may take many months for new knowledge and contacts to translate into improved business performance. There was therefore little likelihood of seeing many examples of improved business performance at this stage of the pilot. Indeed, it is encouraging that a third of the interviewees (33%) believe that business performance will improve going forward because of their participation in the pilot. Where interviewees did record business performance improvements (either achieved or expected), they tended to come from small businesses.

Over a third of interviewees (nine, 38%) indicated that the programme had not created any tangible benefits for them. Of these nine, four were micro businesses, three were medium businesses, with the firm size being unknown for the remainder. For the interviewees saying they saw no benefits, in many cases, they felt that they only had low-level programme involvement, meaning that there was little chance of them seeing any real benefits.

#### 4.4.2 The pilot's contribution

As indicated in Figure 10, the interviewees had mixed views on the attribution (or the 'additionality') of the benefits seen through the CN pilot but in general the attribution reported is fairly low. A large proportion (12, 63%), felt that most or all of the benefits would have been realised without the programme.<sup>13</sup> Therefore, although the activities of the pilot programme were useful to them, they felt their business would not have looked very different without it. Of the other 37%, many (16% of the total interviewees) reported that a substantial proportion of the benefits would have been realised anyway (i.e. without the programme) and only 21% of the total reported a reasonable level of attribution (i.e. that only a small proportion of the benefits would have been achieved without the programme). No interviewees reported full additionality (i.e. none of the benefits would have been achieved without the programme). These figures are in fairly sharp contrast to those reported for the NW pilot, an equally 'light touch' intervention, (Figure 17), where 69% report high attribution/ additionality (either none of the benefits would have been achieved or only a small proportion of the benefits would have been achieved without the programme).

Figure 10 Responses to "To what extent could you have achieved these benefits even without involvement in the programme? (n=19)



Source: Technopolis analysis of participants survey

Even where benefits may not have been additional, in some cases, pilot involvement has helped accelerate the rate at which changes have been made. Amongst our 24 interviewees, five indicated that the pilot provided low levels of additionality in terms of the benefits and outcomes achieved, but that the CN pilot had helped them quicken the rate at which they saw these benefits. In the main, this was because pilot involvement helped give them the added confidence or encouragement to make changes that they had already contemplated, or because the pilot helped them identify areas of the business to prioritise. As one interviewee stated:

<sup>13</sup> Of these twelve, five were small businesses and three medium sized ones (the remaining ones were either large, micro, or had an unknown size).





*"I wasn't aware of lots of things until we sat down and talked about it. It's made our development a lot quicker."*

Others have spoken of the very positive role that the Cornwall pilot has played for them, particularly in helping maintain the motivation of business owners. As another interviewee stated:

*"The programme gives you a sense that you're bigger than something, than your day to day job. It gives not only an inspiration to keep going, but also a sense of community with the other businesses to learn what trouble they're having. I think it was vital and I would have struggled to keep up my passion for so long without going to sessions like this"*

#### 4.4.3 Sustainability of the benefits

One of the main aims of the Cornwall pilot is to create a meaningful and long-lasting network among business owners to encourage collaboration and knowledge sharing amongst them.

Interviewees expressed mixed views on the extent to which they are likely to continue interacting with the businesses met through the programme. Approximately half the interviewees (46%) said they now felt part of a network with a number also indicating that they have already interacted with businesses they met through the pilot outside a CN programme context. Examples of interaction have included:

- The continuation of Action Learning Groups post-pilot
- Several interviewees highlighted how contacts they met through the pilot were now potential customers or suppliers to engage with in the future
- Some beneficiaries have been invited to visit other businesses they met through the programme
- Others are engaging in a more informal (e.g. through social media, emails, or telephone calls) to ask each other questions or to share resources.

For the other half of the interviewee group (54%) however, there is some scepticism over the potential of longer term benefits, indicating that their pilot involvement has not left them feeling part of a network. These interviewees have not engaged with contacts outside the pilot, for reasons including:

- Contacts being too geographically dispersed to continue to meet
- Participants are too busy to engage with others
- Contacts gained were not relevant to the needs of the business
- Some interviewees only attended one event and therefore had insufficient pilot exposure to develop new contacts or knowledge

Our analysis shows that all types of firm can derive benefits from pilot involvement. However, it appears from our relatively small sample size that to date, small businesses have tended to be most able at translating the new knowledge and capabilities gained into either improved personal behaviour or improved business performance. Our analysis has also found that success is also greatly dependent on the attitude and mindset of the representatives that each business puts forward for the pilot. Typically, those speaking most enthusiastically about the programme have been those with limited managerial experience to date, and those who have a more open mindset and are more receptive of taking on board new ideas. Often more junior staff, with limited managerial experience (and possibly more to learn) spoke most enthusiastically of the CN pilot, as were managers in small and medium sized businesses where there is a greater ability to free -up time to participate. However it might also suggest that 'offer' isn't quite right for owner-managers of smaller firms.



### What benefits and outcomes has the pilot helped achieve?

#### Summary of benefits

- **Information and knowledge diffusion:** this has been one of the main sources of benefit. A notable proportion of interviewed beneficiaries noted that their pilot involvement has helped them improve their knowledge of how to raise their business' performance.
- **Improved skills and business capabilities amongst business leaders:** a fair proportion of interviewed beneficiaries have spoken of how programme involvement has helped make them feel more confident about how to improve their business' performance. This did not always translate into any changes in personal behaviour (notably improved leadership and management skills). Nevertheless, there are a number of cases where pilot involvement has helped encouraged beneficiaries to make changes to their business, albeit that these changes have not been especially transformational to the business
- **Improved business performance and productivity:** relatively few indicated that the pilot had led to significant changes in their business' performance to date – an unsurprising result given that BtB has run the pilot for a short time period but that business performance improvements can take several months or even years to materialise. In cases where there has been a positive impact on performance, it has largely been through meeting new suppliers or clients.
- Approximately a third of interviewees recorded seeing no benefits yet from their pilot involvement

#### Attribution of benefits

- There are mixed views on the attribution of the benefits to the pilot but in general the attribution reported is fairly low. Many said they could have achieved the benefits without pilot involvement but some commented that the CN programme did lead to quicker business development, providing the confidence and impetus to enact business changes they had already contemplated

#### Sustainability of benefits

- There are mixed views on the sustainability of the benefits. Several participants have remained in touch with contacts gained through pilot involvement because they may be potential new suppliers or clients. However, there is little indication that interviewees view the pilot as a useful longer-term support which can help them address future or ongoing issues – over half the interviewees did not feel connected to a network

#### Delivery implications

- Currently, it seems that the programme as it currently stands is best suited to junior managers within small businesses. If wants to target other individual types (e.g. CEOs of medium sized businesses), then it will need to offer a different pilot offer.

# North West pilot



Be the Business

## 5 The North West pilot

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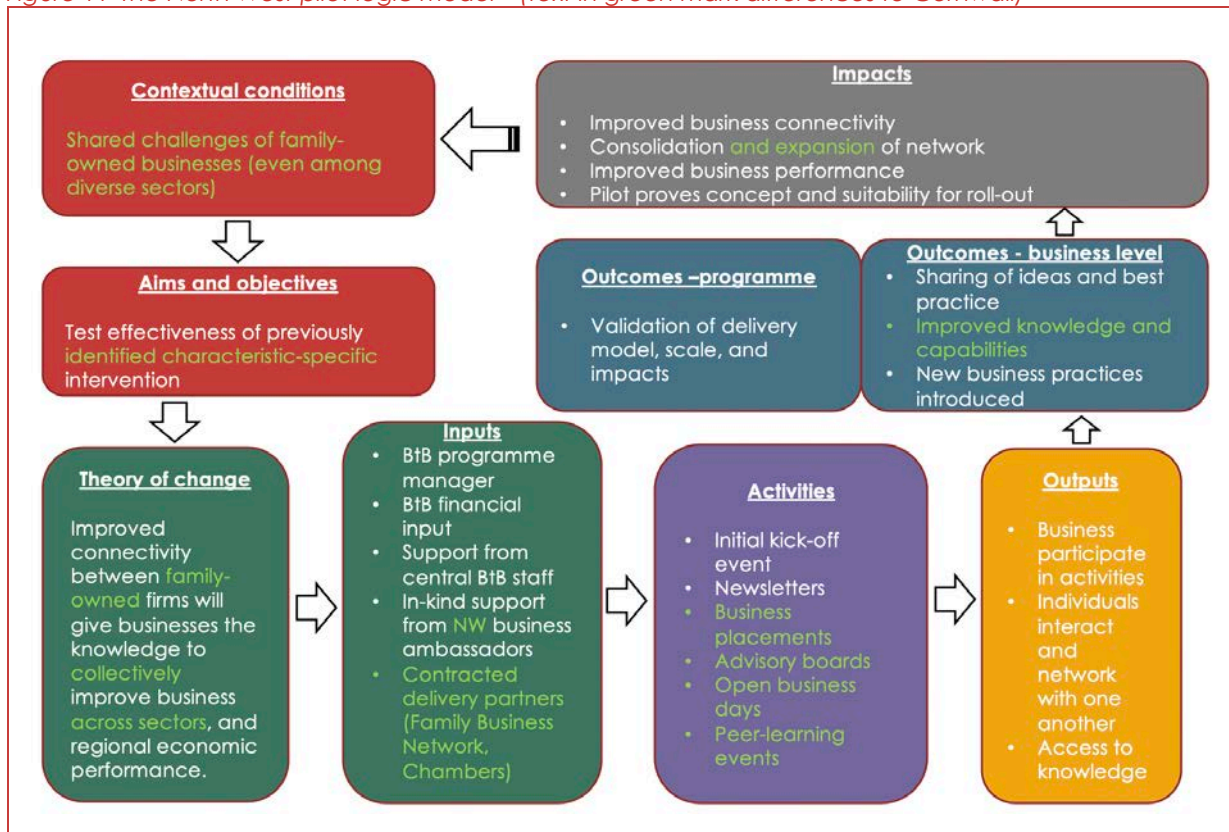
### 5.1 How the pilot looks to improve outcomes

#### 5.1.1 *The theoretical framework*

In April 2019, BtB launched the NW pilot with a particular focus on Cumbria and Lancashire. It already had a valid logic model to explain the translation of inputs to impacts but which did not present its links to underlying the contextual conditions. We have summarised both below in Figure 11. As shown, the pilot seeks to tackle some of the common challenges faced by family-owned businesses by providing opportunities to share cross-sector best practice on management approaches. The pilot approach assumes that by improving the connectivity of family-owned firms, it will give businesses access to the knowledge to individually and collectively improve businesses operations across all sectors, ultimately leading to an improved performance of the regional economy and ensure that there is sustained and expanded connectivity between businesses.

In the North West, BtB carefully considered the need for a CN programme intervention. Our stakeholder interviews revealed that BtB placed greater attention on ensuring that CN introduced measures meeting specific local needs. The decision to concentrate on family-owned businesses came after canvassing the views of influential figures in the region, recognising that the ownership structures of these types of businesses present unique management challenges (e.g. success planning, managing unique team dynamics). The choice of the specific North West pilot activities also came about through conversations with local stakeholders. BtB engaged with existing delivery partners in the North West such as the NW Business Leadership Team and the North West Family Business Network to understand the gaps in existing provision, and where additional support could provide added value. To that end, BtB adopted a cross-sectoral implementation approach, recognising that there were few existing schemes that had attempted this.

Figure 11 The North West pilot logic model<sup>14</sup> (text in green mark differences to Cornwall)



Source: Technopolis

As with Cornwall, fundamental to the NW pilot's success is involving individuals that are willing to share relevant information with each other. Indeed, we understand from programme documentation that part of BtB's rationale for implementing a cross-sectoral approach is that firms from different sectors are unlikely to see each other as competitors, and will therefore be more likely to share information on how to manage common problems. In addition, while the Cornwall pilot relied in part on a series of one-off events (e.g. masterclasses, Hospitality Hacks Roadshows), in contrast the North West pilot took a more longitudinal approach across each one of its activities, encouraging the same individuals to meet each other on multiple occasions. This approach therefore also assumes that participants are sufficiently interested, willing and able to build relationships and maintain trust with one another across successive meetings.

### 5.1.2 Pilot implementation

The North West pilot focused on the following four core offerings:

- **Business placements:** this provides opportunities for participants to visit and experience other businesses for between one day and one week. Business placements were designed to allow individuals to gain a first-hand understanding of how other businesses operate. Participating businesses were matched with another business to undertake the placement, which consist of visits to the other business to undertake an exchange of information. Business placements were delivered by a partnership of three Chambers of Commerce within the region (Cumbria, East Lancashire and North and West Lancashire) based on a

<sup>14</sup> Some consultees had also received Productivity Through People support, but because it was not a core part of the CN offer, we excluded it from the analysis

commercial tender. Programme monitoring data indicate that 68 individuals have attended at least one business placement

- **Advisory Boards:** these give participants access to Advisory Boards which expertise and advice to businesses of the form (and style) that would be provided by non-executive directors. The Advisory Boards are coordinated by Be the Business, drawing on networks to recruit board members (for example the North West Business Leadership Team's 'Rising Stars' programme). Be the Business assembled four boards of five people, with each board serving two family-owned businesses, generally from different sectors. Board meetings take place on a quarterly basis with each board seeing one business in the morning and one in the afternoon. The agenda for meetings typically covers performance, challenges, and progress made. At the time of writing, the four Advisory Boards had met twice, and have been used by 13 individuals from participating businesses
- **Open Business Days:** these bring together multiple businesses, designed on an 'open house'-style basis to visit another firm, recruited by Be the Business with support from the Family Business Network. The open business days were trialled in November 2019 in Cumbria, with each day comprising several talks or sessions. The days were intended to foster learning from the visit, and also encourage discussions and the bonding of participants as a group. This intervention is more light-touch and perhaps serves a less-core demographic. Programme monitoring data, indicates that 28 individuals have participated in visits
- **Peer Learning groups:** these operate in an action learning mode based on principles from the European PLATO programme,<sup>15</sup> which was designed to transfer management skills from large enterprise managers to SME managers. The peer learning events are challenge-based, with participants invited to raise issues for the group to collectively address and solve. The peer learning events strand is run by two managers from Sellafield and two Professional Services leaders. BtB supports the coordination of the intervention, including processing applications to participate and organising dates and venues, but has a relatively low degree of direct intervention in the material or themes. Participant businesses themselves identify the themes covered in each session, with delivery partners dealing with recruitment and co-ordination. Two rounds of the peer learning strand had been held at the time of writing, attracting 16 individuals

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<sup>15</sup> Whereby A group of 15 SME managers receive mentoring support from two managers of large companies in all aspects of enterprise management. See: <https://www.eurofound.europa.eu/observatories/emcc/erm/support-instrument/plato>

### Summary - How does the programme design aim look to improve outcomes for its target audience?

- The pilot aims to provide activities that facilitate networking and knowledge diffusion amongst family-owned businesses in the North West. Doing so is meant to create self-sustaining networks, and improved connectivity between firms
- Central to the BtB's adopted model is an assumption that participants are willing to share information with one another. The cross-sectoral design is a fundamental part of this, the assumption being that if firms interact with those in different sectors, they are less likely to engage with direct competitors and will therefore be more likely to share knowledge with each other
- The pilot has drawn on local delivery partners to identify gaps in business support provision, recruit beneficiaries and run the activities, helping ensure that BtB is also funding activity that would not exist otherwise
- In response to these issues and challenges, the pilot has primarily used four activities to encourage knowledge sharing between target firms: business placements, Advisory Boards, Open Business Days, and Peer Learning events.

#### Delivery implications

- The North West pilot's engagement with local providers to determine gaps in market provision has worked well and is something that BtB should repeat in other areas to ensure that they are not duplicating existing activity in the area

## 5.2 Reaching the target audience

### 5.2.1 Who was the target audience?

As highlighted through discussion with BtB stakeholders, the North West pilot has targeted family-owned businesses based in the North West. BtB has taken a broad definition of a family-owned business. It does not only include businesses firms where all the employees come from one family. It can also include larger organisations which have no employees from the family, but where the company's ownership consists only of one family, and where management succession planning focuses on transfer or company ownership within the family also.

While BtB has targeted SMEs (particularly non-micro businesses) and articulated this to delivery partners in their contracts, it did not have any strict exclusion criteria. However, delivery partners did not always understand who the pilot's target group was, with some stating via interview that they were not always sure whether to accept larger organisations that had expressed an interest in programme participation.

Unlike Cornwall, the North West pilot has also sought to be cross-sector, with all firms eligible provided they are family owned.

### 5.2.2 Did the pilot reach its target audience?

Programme monitoring data indicates that the pilot supported 269 individuals from 218 different businesses (excluding organisations deemed to be providers, sector bodies, or other public bodies). The partial nature of this data means that we can only make limited assertions on the extent to which the North West pilot met the target audience described above. While we have not been able to verify whether every participant business was family owned, based on feedback from stakeholders, delivery partners, and beneficiaries interviewees themselves, it appears that all participants have fulfilled this criteria.



As Figure 12 shows, beneficiaries were spread fairly evenly across the target region, with no overt concentration in major urban centres. Cumbria is well-represented, though it is also clear that firms in Cheshire and Lancashire, and as far south as Staffordshire have participated in the programme. The concentration of beneficiaries in certain areas of the North West largely reflects geographical sphere of influence of the delivery partners used.

*Figure 12 Location of North West pilot beneficiaries (based on postcode data for 49 firms)*



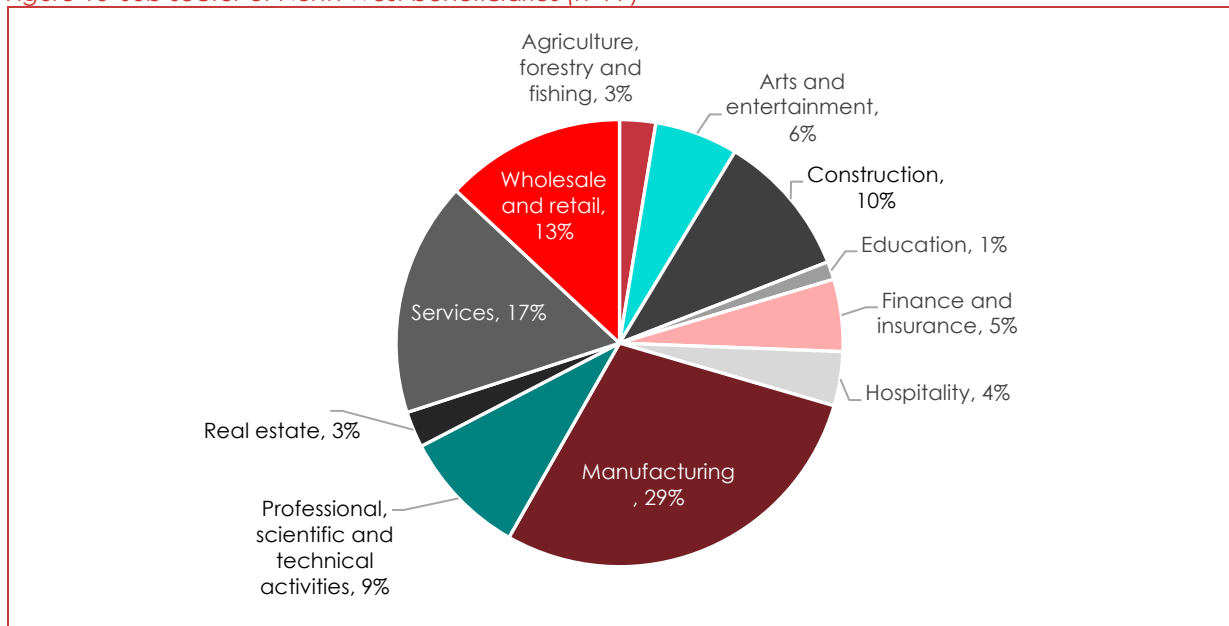
Source: Technopolis analysis of programme monitoring data

Based on the limited monitoring data available, it also appears that there is a reasonable distribution of participants across different sectors, helping reach the targeted cross-sectoral audience. Data for 77 beneficiaries shows the sectors that businesses operate in. As Figure 13 shows, below, while 29% of beneficiary businesses work in manufacturing, there is a somewhat even distribution of other sector types. Some 17% of beneficiary businesses work in services, 13% in retail and 10% in construction. The remaining 30% span a range of sectors spanning a wide range of sectors from arts and education to professional, scientific and technical activities to agriculture.

Data on firm size was available for 93 beneficiaries (42% of the total). Of these, 37% are micro businesses (0-9 employees), 29% were small businesses (10-49 employees) 28% were medium-sized businesses (50-249 employees) and 6% are large businesses (250+ employees). This distribution of beneficiary firm size is much more even than in Cornwall, and shows that the North West has seen some success in reaching firms of all sizes, as per the pilot design, albeit that the proportion of beneficiaries that were micro-businesses may be a little higher than BtB may have wanted.

In summary therefore, based on the data available, the North West pilot appears to have successfully reached all elements of its target audience.

Figure 13 Sub-sector of North West beneficiaries (n=77)



Source: Technopolis analysis of pilot monitoring data

### 5.2.3 The mechanisms and nature of audience engagement

Beneficiary interview feedback has provided insights into the ways that BtB successfully recruited participants and engaged them in the programme. In terms of becoming aware of the CN pilot programme: six of the 15 interviewees that answered this question (40%) stated that they became aware of the pilot through the North West Family Business Network, suggesting an important role for this partner. Smaller proportions reported having heard about the pilot through targeted emails or social media advertising (20%) while one respondent each reported having heard about the pilot directly from Be the Business, their local Business Growth Hub, Chambers of Commerce, or consultants.

The North West's audience engagement tactics appear to have been effective. All beneficiary interviewees indicated good awareness of the objectives of the part of the pilot they had been involved in, with interviewees' perception of the aims and objectives largely mirroring those appearing in the programme theory of change. There is also some awareness amongst North West beneficiary interviewees that the programme provides a range of different activities. According to programme monitoring data, 15 individuals have used more than one intervention, with nine having used two activities, and six having used all four available.

Given that BtB has outsourced pilot delivery, it is equally important that the delivery partners are aware of the programme objectives so that they can share these with beneficiaries. The delivery partners interviewed for this study seems to be aware of the programme's objectives, albeit with some initial challenges in them understanding the pilot's scope. As alluded to previously, the most significant example of this was some confusion around the eligibility of large businesses. Some delivery partners initially turned away eligible large businesses before subsequently reversing this decision. This again reinforces a certain lack of understanding amongst some delivery partners of the target audience.

Although it is clear that the pilot is reaching its target audience, there are some wider considerations that BtB needs to make. Our analysis indicates that thus far, the family-owned criterion in the North West has been appropriate. However, the criterion may eventually introduce some difficulties going forward in identifying new recruits. This only relates to the visibility of the 'family-owned' criterion, as compared to sectoral or size classifications as a way





to target new participant firms. There was some suggestion of saturation having been reached quite quickly from one delivery partner, but another delivery partner working in another area indicated that there were still others they could target. The implication here is that the North West pilot in its current approach (i.e. communications channels and methods, delivery partners used) might have accessed most of the 'easiest' to access family-owned businesses and reaching more may require considerable resources. This additional resource may not be justifiable if they are only likely to yield a small number of new clients. Instead, it may be more sensible for BtB to look to work with a wider range of delivery partners that have different geographical spheres of influence. The North West pilot covers a large geographical area with numerous SMEs, many of which will be family-owned. Working with new delivery partners in different parts of the North West may help secure new clients within the target audience.

#### **Summary - Is the programme reaching its target audience?**

- The North West pilot's target audience is family owned businesses of all sectors. While there is no exclusion criteria, the pilot was especially keen to support small and medium sized businesses (i.e. non-micro businesses)
- According to the partial monitoring data available, the pilot has successfully reached a broad spectrum of different sized firms and different sectors, albeit that the number of micro-businesses supported may be a little higher than BtB may have wanted. All firms appear to be based in the North West while there is no evidence that indicates that non-family owned businesses have participated
- Existing recruitment channels appear to be effective, delivery partners being an effective source of reaching potential participants. Compared to Cornwall, North West beneficiary interviewees appeared to have a much better understanding of the CN programme's offer, and what the programme was hoping to achieve

#### **Delivery implications**

- With the pilot reaching the target audience there seems little need to change current recruitment strategies, or the current loose nature of the inclusion criteria
- However, there are signs that some of BtB's existing delivery partners may be exhausting their existing contacts. They may therefore need some creative approaches to identifying and communicating with relevant firms given that family-owned businesses may not be easily identified through traditional business databases
- It may be also be sensible for BtB to investigate working with new or additional delivery partners that may have different geographical spheres of influence to those that BtB currently uses. The sheer geographical size of the regions and quantity of family-owned businesses suggest that it should be possible to find more clients – provided that BtB finds the right partners. Existing social media groups, local authorities, and local branches of national trade associations may also provide links to new relevant contacts
- The pilot may benefit from providing delivery partners with greater clarity on pilot eligibility criteria

### **5.3 The effectiveness of the different activities**

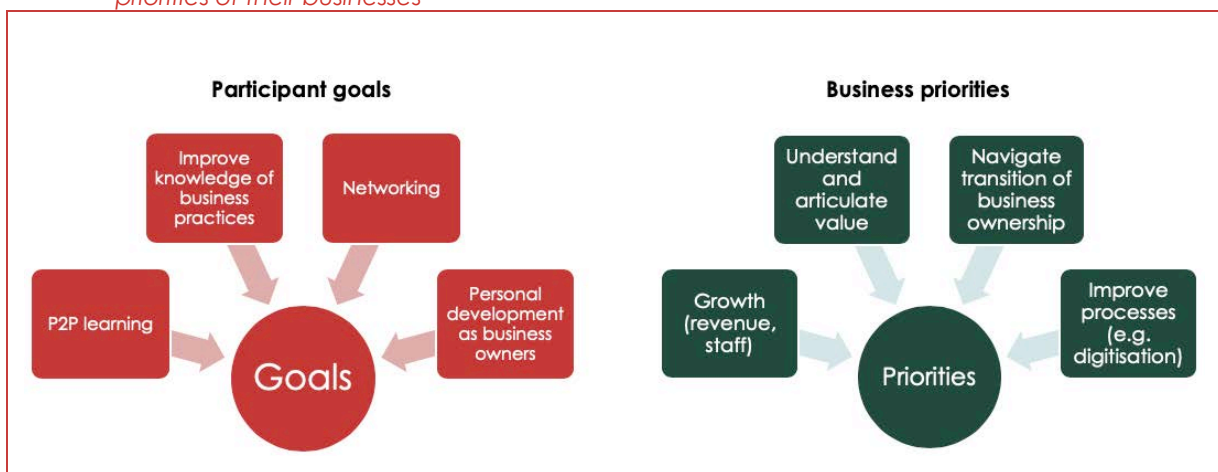
#### **5.3.1 Participants' goals**

The first step in determining the pilot's effectiveness is better understanding what participants hoped to achieve from their programme involvement.

Participant interviews have helped reveal participants' main motivations for pilot involvement. Figure 14 summarises the main responses and as shown, overlap greatly with those of the Cornwall pilot participants. Nine of the 19 participant interviewees said that their main motivation for engaging with the pilot was to network and connect with others. For some, this networking was with the specific aim of learning how others approached business problems similar to ones they were facing themselves. Some of the issues that participants wanted help with was management succession planning, how to motivate staff, diversifying the business, and business processes (e.g. payroll and sales processes). Some of the interviewees also served on the CN Advisory Boards and while they were looking to network and learn from others, they also wanted to give back to the business community or contribute to regional economic prosperity.

Interviewees also set out their current priorities for their businesses. There was some overlap here with Cornwall pilot participants, particularly in terms of growing the business (either by headcount or revenue), diversifying the business, or finding new business management strategies. However, others were equally, if not more, interested in putting the business on a more secure longer term footing. For some, the priority was to ensure a smooth change of business ownership for others, the emphasis was on streamlining existing management processes, for example, by pushing forward with digitisation.

Figure 14 Summary of what participants were looking to achieve from programme involvement, and the priorities of their businesses



Source: Technopolis analysis of participant interviews

### 5.3.2 How far did the pilot help participants reach these goals?

Of the 16 interviewees that answered the question “How relevant has the programme been for your personal and business needs?”, all said that the programme was either ‘very’ or ‘completely’ relevant to their needs – each option receiving eight responses respectively. The pilot seems to have been especially effective in helping participants connect and network with others – an important motivation for pilot participation for several interviewees. All interviewees stated that the North West’s activities had enabled them to meet with businesses ‘appropriate’ to them. Some beneficiaries added that the sectoral diversity of those they connected with also helped them better understand how they could improve their business, providing a more diverse range of perspectives and business expertise.

### 5.3.3 The relative effectiveness of the different activities in meeting these goals

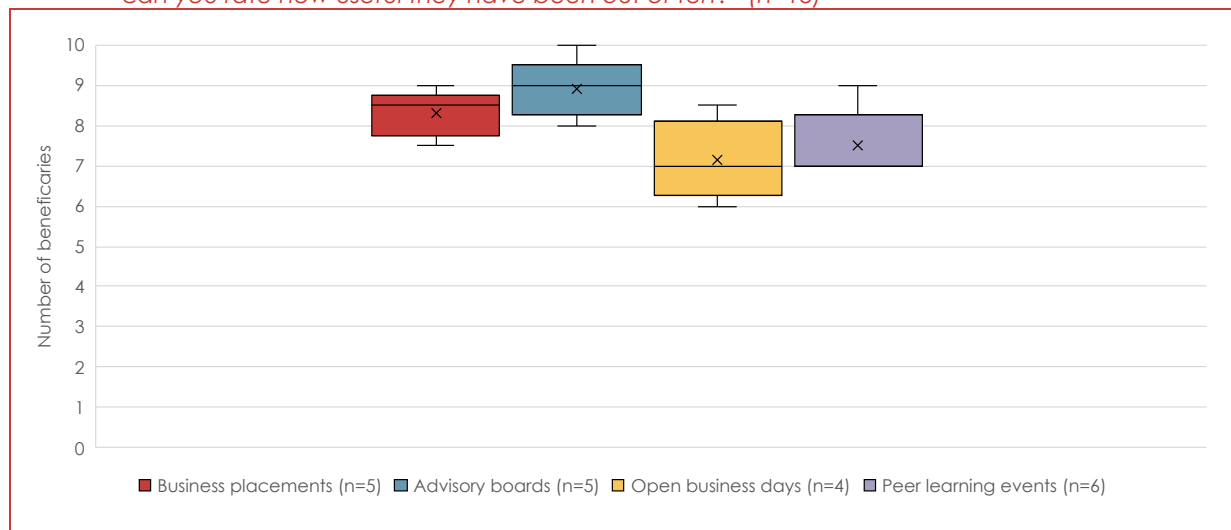
Interviewed beneficiaries spoke very highly of the pilot’s activities as a whole, saying they were well organised while all the North West interviewees said that they met with businesses appropriate to them (compared to 73% for Cornwall). Interviewees highlighted several general



aspects that worked well in the North West pilot activities. Beneficiaries spoke of how the pilot's marketing material, and the content of activities themselves used a language that was relevant to local SMEs. Some interviewees also commented on how they were more likely to engage with the programme because it did not feel like a more generic networking offer that a consultant might pull together – instead it felt peer-run and bespoke to the North West's family owned business community. Other positive aspects of the pilot activities as a whole (as identified by beneficiaries) included offering a mixture of learning options (e.g. a mixture of learning options such as exposure to more informal knowledge exchange avenues alongside the more structured requirements of Advisory Boards), and not having to share ideas with direct competitors.

Aside, from this broader feedback, 18 interviewees also provided comments on the usefulness of the pilot's different activities, summarised in . Each interviewee scored each activity they participated in out of ten. The interview group saw the Advisory Boards as the most useful pilot strand. While the number providing a response to this question was low, stakeholder interviews also emphasised the particular effectiveness of the Advisory Boards.

Figure 15 Box and whisker plot<sup>16</sup> of answers to “For each activity that you have been involved in, please can you rate how useful they have been out of ten?” (n=18)



Source: Technopolis analysis of participant interviews. X denotes mean, while for peer learning events, the median is the same as the lower quartile

The table below sets out positive remarks and suggestions for improvement against each intervention within the North West pilot provided by all interviewed individuals (including stakeholders, delivery partners and beneficiaries). Business Placements are found to be good avenues to explore how other businesses tackle challenges in-depth, and also appear to be a good way to build contacts.

Areas for improvement include more support to business placement participants on both sides (e.g. a guidance note on how to get started), and shorter-run times for the placements, suggesting for example half a day (where the originally-envisaged run times could be one to several days). Interviewees also mentioned ways that participants graduating from the Advisory

<sup>16</sup> Box and whisker plots summarise five sets of numbers. The box covers the lower quartile to the upper quartile with a solid horizontal line denoting the median. There are two whiskers which go from each quartile to the respective minimum and maximum values.



Boards intervention might still draw on board member to help support their business' continuing development. Open Business Days are well-regarded for the diversity of learning opportunities, but are very light-touch. Peer Learning Events are well-regarded for both their content and facilitation approach, though those facilitating the learning sessions suggested that more information on peer learning participants ahead of time (e.g. levels of experience, up-front view of learning set priorities) would allow them to better tailor the sessions.

*Table 3 Feedback on the different North West pilot activities*

Activity	Positive remarks	Areas for improvement and learning points
Business Placements	<ul style="list-style-type: none"> <li>• A good avenue to explore in depth how others tackle challenges</li> <li>• A good forum for connecting with peers and building contacts</li> <li>• Visits are regarded as informative</li> <li>• Access to expertise that can be leveraged within the individual businesses afterwards</li> </ul>	<ul style="list-style-type: none"> <li>• Preference among beneficiaries for shorter run-times (e.g. half days)</li> <li>• Identified need to include a 'trigger list' (or agenda) of items to cover during a placement. This would be prepared by BtB or relevant delivery partner to mitigate reported uncertainty about where to start and what to address in the placement. The trigger list would ideally be shared by both sides of the exchange, effectively forming a meeting agenda for participants to follow together</li> <li>• Related to scaling, some beneficiaries suggested there could be a need to reinforce ahead of the placement that the visits are to exchange practices and information, not sales meetings.</li> </ul>
Advisory Boards	<ul style="list-style-type: none"> <li>• Access to high-quality, relevant expertise from businesses around the region</li> <li>• Has helped beneficiaries to gain valuable big picture perspectives on their businesses</li> <li>• The structure of reporting to the board has forced (or empowered) businesses to examine specific aspects of performance that they had not before, such as how much time is spent on activities that are profitable vs. those that are less-profitable</li> <li>• Well run in terms of logistics and allocating individuals</li> </ul>	<ul style="list-style-type: none"> <li>• A number of participants suggested that firms that 'graduate' from the scheme could be provided with tools, such as a dashboard or spreadsheet templates for 'everyday' use,</li> <li>• Beneficiaries 'graduating' from the Advisory Boards could be offered a development pathway to ensure they are able to build on their experiences (and also form their own boards</li> <li>• Lots of appetite to scale – including by converting beneficiaries to board members in future</li> </ul>
Open Business Days	<ul style="list-style-type: none"> <li>• Diverse learning opportunities</li> <li>• Good opportunities for participants to network and bond as a group</li> </ul>	<ul style="list-style-type: none"> <li>• This is a very light-touch intervention that participants found difficult to critique</li> </ul>
Peer Learning Events	<ul style="list-style-type: none"> <li>• The challenge-based approach is very well-regarded</li> <li>• Participants praised the ways in which participants are encouraged to suggest challenges to be solved by the collectively group</li> <li>• Good opportunities for building a network</li> <li>• Run by well-regarded individuals from leading local businesses rather than external parties</li> </ul>	<ul style="list-style-type: none"> <li>• Beneficiaries felt it was too early to comment on potential improvements</li> <li>• A facilitator felt it would be beneficial to receive more information about participants' experience in advance</li> <li>• There was some consideration that only one person per business should attend per session in order to ensure full transparency (i.e. to mitigate any hesitation to share issues in front of family members)</li> </ul>

Source: Technopolis analysis



To some extent, these comments reflect the diverse range of businesses that the pilot has supported. We have spoken to only a small portion of the participants and stakeholders involved in the pilot but the general consensus is that the current delivery approach works well and all that may be needed is some fine-tuning to existing activities, or even strands within these activities.

#### **Summary - Which elements of the programme are most effective?**

- Interviewed North West pilot beneficiaries have said that the pilot has been well-run, believing the pilot had tailored marketing materials and activity content to them
- Interviewed beneficiaries appear to have particularly valued meeting other businesses with shared challenges, and the diversity of perspectives that comes from involving people from multiple sectors
- While interviewees have complimented all the pilot activities, on the whole they found the Advisory Boards to be the most useful programme element. The small sample size involved however, means that it is unclear how representative this is of all pilot beneficiaries

#### Delivery implications

- Individual respondents have provided different areas of improvement for specific pilot activities. These could serve as the basis for the fine-tuning of future activity delivery. However, our analysis (and especially beneficiary interviews) does not indicate any need for fundamental changes to programme delivery
- In terms of tailoring and targeting future activities in the North West:
  - Business priorities are the growth (both headcount and revenue) and diversification
  - At the individual level, programme participation is driven by wanting to explore business practices among peers

## 5.4 Benefits and outcomes of the pilot

### 5.4.1 Benefits achieved from pilot involvement

As highlighted in Figure 11 Figure 3, the main intended outcomes and impacts for the pilot were improved knowledge and capabilities on how to best run their business, altered business management practices, and the consolidation and expansion of existing business networks in the area. In the longer term, these improvements would also translate into improved business performance.

As shown in Figure 16 below, interviewees reported a wide range of benefits resulting from their pilot involvement. As with Cornwall, a large proportion reported improved knowledge and capabilities from their programme involvement, a core pilot objective. For example, 87% of the 15 interviewees<sup>17</sup> answering an appropriate question now feel more knowledgeable about how to improve their business performance, a proportion considerably larger than the corresponding Cornwall figure of 50% (albeit with a larger sample size of 24). Over half (53%) of the North West interviewees also indicated better confidence about how to improve their business performance. Interviewee examples of new knowledge gains include learning how similar businesses or similar individuals have dealt with business issues such as upcoming

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<sup>17</sup> Four of the 19 interviewees did not provide an answer to the question concerned.

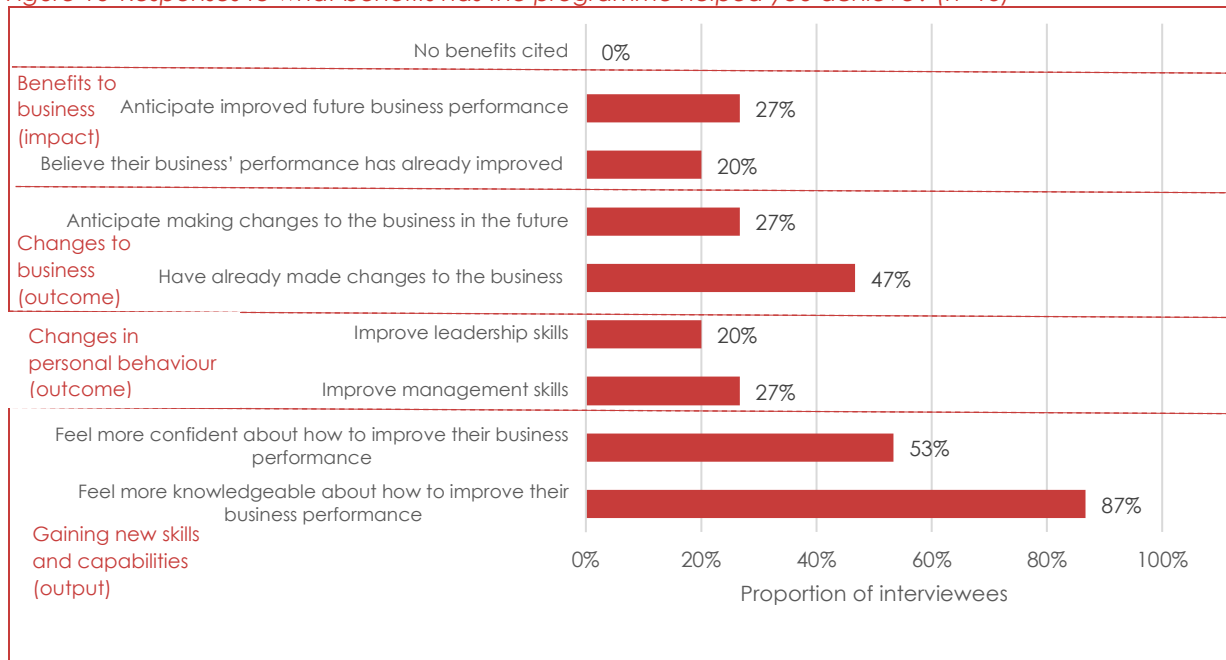


transitions in ownership (i.e. between generations), business planning, and various aspects of strategic management.

It is therefore evident that the pilot has helped fulfil one of the core pilot objectives for the vast majority of interviewees: facilitating information and knowledge diffusion. A closer examination of the data collected shows that there is no clear link between the size or sector of a firm, and the chances of seeing improved skills and capabilities through pilot involvement.

There are fewer examples of pilot involvement having led to changes to their personal behaviour: 27% of those interviewed said that they now had improved management skills while 20% of those interviewed spoke of having improved leadership skills. Nevertheless, there are some instances where the pilot has led to profound changes in personal behaviour. Several interviewees spoke about how working with the Advisory Boards in particular had forced them to become more disciplined when it came to business management. Whereas previously, participants may have been overly focussed on the day-to-day running of the business, the regular challenge provided by the Advisory Boards had forced them to consider their business at a more strategic level.

Figure 16 Responses to what benefits has the programme helped you achieve? (n=15)



Source: Technopolis analysis of participant interviews

A larger proportion of interviewees (47%) reported having deployed their new knowledge, capabilities, and confidence to make changes to their businesses, another core pilot objective, while 27% anticipated making changes in the future. As with Cornwall, these are considerable proportions for a programme that is still in progress. Examples of business changes made include implementing management practices or techniques e.g. new business planning technique, and greater use of data in business planning. There were several instances where pilot engagement had helped instigate some profound changes to the business. One beneficiary interviewee spoke of how the pilot helped make them aware of another business that had made significant cost savings after making small tweaks to a single process. This led to the interviewee introducing a brand-new management process to their business, with the business implementing a new policy to ensure that staff could implement low-intensity actions that could lead to incremental improvements.

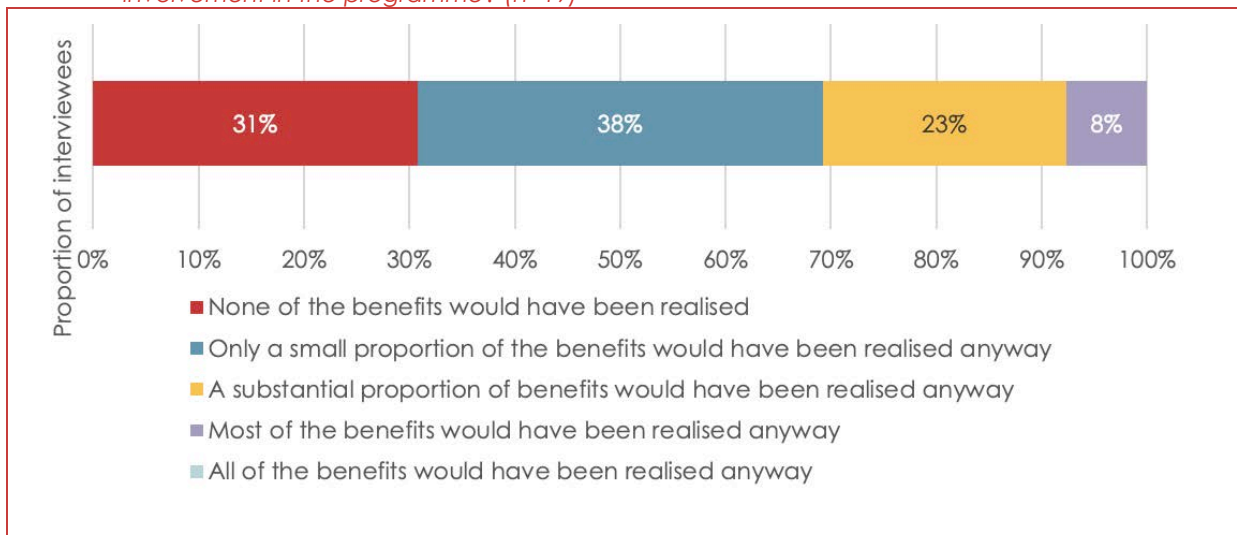


For most businesses, it is still too early to concretely identify any business performance improvements resulting from CN participation. Figure 16 highlights that only 20% of North West interviewees believe that CN involvement has helped improve business performance already. Nevertheless, more believe there is future potential for better business performance, with 27% of interviewees anticipating improved future business performance. Furthermore, even though the pilot is only a few months old, there is already one powerful example of a business finding significant cost savings. The interviewee above who introduced new measures to encourage incremental management improvements said that the changes had resulted in £600,000 of savings across the business.

#### 5.4.2 The pilot's contribution

As indicated in Figure 17, the interviewee group was clear that the CN pilot was central to achieving the benefits cited above. Some 69% of the 13 interviewees that commented on the programme's additionality stated that "none" or "only a small proportion" could have been achieved without the CN pilot. In particular, interviewees stressed how the programme is an enabler for their own actions. There was also broad interviewee consensus that the programme is unique and not easily replaceable.

Figure 17 Responses to "To what extent could you have achieved these benefits even without involvement in the programme? (n=19)"



Source: Technopolis analysis of participants survey

Not only has the programme helped to create additional outcomes, it has also quickened the pace at which businesses have made change that they had already planned to introduce, as the below quote from one interviewee exemplifies:

"Search engine optimisation is something we'd planned to look at, but we wouldn't have gone into with the same knowledge we have now from the placement. We would have ended up spending more money. We might have come to [the search engine optimisation] eventually, but this has been a time-saving thing that meant we came to it quicker"

#### 5.4.3 Sustainability of the benefits

One of the pilot's central aims is to create a meaningful and long-lasting network of family-owned businesses in the North West which members can draw on for support and expertise. Generally speaking, this appears to have been the case. Seven of 14 interviewees stated that they now feel part of a network as a result of the pilot. Even for an intervention that is still quite





new, there are already signs that businesses that have met through CN have already started interacting with each other outside a pilot setting. Some interviewees for example, have been in touch with members of their Advisory Board in an ongoing or informal context outside of designated board meetings. Geographical proximity has been an important enabler for businesses continuing to interact with each other, with several Cumbria participants remaining in contact with each other.

Those that reported not feeling part of a network largely suggested this was because they had not been involved in the programme for long enough and needed more contact time with other participants. However, many were optimistic that the contacts made through the pilot could become long-lasting ones. Some pilot participants have already stated a desire to sit on Advisory Boards in the future, highlighting a real potential for the North West pilot to generate longer-term networks and contacts.

While in Cornwall, firm characteristics did appear to have some bearing on the ability to see larger impacts from pilot involvement (small businesses tend to benefit more profoundly than micro businesses), there appear to be no such linkages in the North West. Certainly, neither firm size nor sector appear to have a bearing on the level of benefits seen. Instead, it is the type of individual participating that has determined how much people get out of the programme. Those speaking most enthusiastically of the programme have been those that have a more open-minded approach to running their business and have also generally been seeking to improve as managers, either by learning about approaches or by accessing external expertise. To that end, we believe a reasonable conclusion is that the pilot has been successful because it has brought the right people together.

## What benefits and outcomes has the pilot helped achieve?

### Summary of benefits

- **Information and knowledge diffusion:** this has been one of the main sources of benefit with a high proportion of interviewed beneficiaries highlighting how pilot involvement had helped them improve their knowledge of how to raise their business' performance
- **Improved skills and business capabilities amongst business leaders:** a large number of the interviewed beneficiaries have also spoken of how programme involvement has helped make them feel more confident about managing their business. This did not always translate into any changes in personal behaviour (notably improved leadership and management skills). Nevertheless, we have come across cases where pilot involvement helped encourage beneficiaries to make profound changes to their business' operations. Some beneficiaries also spoke of how continued engagement with peers they met through the programme will be important in shaping management practices in the future
- **Improved business performance and productivity:** to date, there have not been many examples of improved business performance but many businesses have not spent enough time on the programme to make such benefits likely in the near term future. However, several interviewed participants do think that the programme involvement will help generate future business performance improvements

### Attribution of benefits

- Two-thirds of beneficiary interviewees stated that none or a small share of benefits would have been achieved without the pilot. The consensus is that CN is unique and not easily replaceable

### Sustainability of benefits

- There are positive signs for the sustainability of benefits with many turning to other fellow participants for ad-hoc and informal advice even outside formal pilot settings

### Delivery implications

- The size or sector of participating firms appears to have no bearing on the extent to which they benefit from the programme, Instead, central to the pilot's success has been its ability to bring similar people together with similar challenges. Future delivery activity should focus on maintaining this.



## 6 Analysis and Conclusions

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### 6.1 The Collaborative Network pilot programmes

BtB has piloted the Collaborative Network approach to business support in two UK regions, focused on two different types of businesses: the hospitality sector in Cornwall and family-owned firms the North West of England. Starting in early 2018 and early 2019 respectively, the two pilots have, to date, supported 600 individuals from 477 businesses - with 55% of these in Cornwall and 45% in the NW.

While BtB chose to work in the two regions largely because of existing institutional links, both pilots address regions and businesses with particularly low productivity levels and therefore the potential to benefit from the right forms of business support. Cornwall, the hospitality sector and family-owned businesses are all low productivity performers. The North West, as a large region, contains a wide range of productivity levels but the pilot strove to reach out to businesses outside the typically higher performing urban centres.<sup>18</sup>

### 6.2 How does the programme design aim to improve outcomes for its target audience?

The rationale for CNs is that information and knowledge that can improve business performance does not sufficiently diffuse from the best or better firms to lower performing firms. Therefore, intervention is needed to facilitate and improve information and knowledge flow between firms, and to create sustainable networks of firms that will continue to support these processes into the future.

To that end, both pilots are implementing a set of activities that are designed to bring businesses together in what are predominantly learning-based activities that create opportunities for sharing knowledge, ideas and solutions to business challenges i.e. in line with the programme intent. These activities are intentionally designed to range from relatively 'light' interventions such as roadshows and business awards, through to progressively more intensive learning activities such as open day visits to local businesses and half-day masterclasses, and through to even more intensive in-depth business placements and action-learning groups. Additionally, many activities are designed to be led by local businesses so that the learning is perceived to be, and experienced as, coming from other businesses rather than from 'business experts' or consultants. This design aims to not only to create buy-in to the CN activities, but to also provide opportunities to make new connections with better performing businesses.

Key to the programme design's success is that the information and learning on offer is relevant to the target audience and that participating individuals are willing to share their knowledge and experience. Central to creating a relevant offer is bringing 'like-minded' businesses together that are facing, or have faced and solved, similar business challenges. The Cornwall pilot tackles this by targeting a single sector - hospitality – providing an easy way to create content and provide contacts relevant to participants. On the face of it, it might be harder to develop content that is relevant for all NW pilot participants given that family-owned businesses span many sectors. However, they face similar challenges (e.g. succession planning, power hierarchies and informal structures) which has also ensured that the North West pilot could provide content relevant to all participants. In Cornwall, there were mixed views as to what was considered 'like-minded', with some people taking a quite a narrow view and others a much

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<sup>18</sup> *Sub-regional productivity in the UK*, ONS: February 2020

*The Economic Contribution of the UK Hospitality Industry*, 5<sup>th</sup> Edition, 2018, Ignite Economics

*Family-owned firms hold part of the answer to the productivity puzzle*, *The Economist*, Dec 2017



broader one that included accessing experienced business leaders from outside Cornwall. While this might have implications for programme design, it might actually be a signifier of a rather closed attitude to learning and improvement and therefore part of the problem the programme is trying to overcome.

Willingness to share information is mainly limited by the extent to which businesses interact with direct competitors. For the NW pilot this is less of an issue as the breadth of sectoral coverage of the family-owned firms means that direct competitors rarely meet. For the Cornwall pilot this is more of a concern and one that cannot be entirely overcome by changes to the design, not least because some participants seem more interested in meeting firms operating in very similar sectors and sub-sectors as themselves. The only solution is taking care in the allocation of people to specific small group activities and ensuring direct competitors are not placed together.

The two pilots used different sets of intervention activities. In Cornwall, BtB selected a set of collaborative learning activities that they wanted to trial as the CN 'offer', while in the NW the activities were designed in consultation with existing local business figures and aimed to fill gaps in local provision. Despite these different approaches, both pilots are implementing activities that clearly align with the overall programme's rationale and objectives, and the evaluation has found no suggestion that any of the activities are inappropriate. Nevertheless, it would seem self-evident that consulting with local experts to identify needs and avoid duplication with existing services is a sensible way to design an intervention.

It would seem from the design of the pilot programmes that the longer-term aim of creating sustainable networks of businesses to support on-going knowledge diffusion and learning is intended to happen organically via the connections made or picked up existing local organisation. Neither pilot has any basic networking support activities in place other than a newsletter. The Cornwall pilot trialled a closed Facebook group but was stopped owing to a lack of resources to continue it, and the group not yielding many rewards. BtB will need to consider how to facilitate sustainability of the connections and networks made once the programme has ended.

### 6.3 Is the programme reaching its target audience?

Both pilots appear to be reaching their target audiences of SMEs in hospitality sector or family-owned businesses indicating that the recruitment activities have been largely successful. However we should note that monitoring data for both pilots is incomplete and our analysis is based on the data available.

To date the Cornwall pilot has supported 331 individuals from 259 hospitality businesses. Data for a sub-set of these businesses (n=230) showed that 46% were in food and drink and 34% in accommodation. Businesses were located across the county but generally more concentrated around the main urban tourist centres. Data on firm size was only available for 28% of the total and in this group 51% were micro businesses, 26% small, 11% medium and 11% large. If this is a typical distribution (which it may not be) then a small proportion (the large businesses) are outside the target audience and a large proportion are in a group, micro businesses, that BtB acknowledges will benefit less from the intervention. However as micro businesses make up a very large proportion of this sector by number (of the order of 80%)<sup>19</sup> this is unavoidable unless

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<sup>19</sup> <https://www.statista.com/statistics/299758/share-of-sector-businesses-by-size-and-employment-in-the-united-kingdom/>  
<https://www.hotrec.eu/micro-entreprises-and-smes-in-the-hospitality-sector-call-for-more-flexibility-on-working-conditions-of-the-eu/>



eligibility criteria are applied and these would, no doubt, be unpopular and possibly unenforceable.

Similarly in the NW; the pilot reached supported 269 individuals from 218 family-owned businesses. In this case firm size data was available for 42%, indicating that 37% were micro businesses, 29% small, 28% medium and 6% large. Unusually, while BtB as an organisation targets SMEs, large businesses were eligible for the pilot and despite some initial confusion among delivery partners over this, a small number did. Wider research indicates that 98% of family-owned businesses are micros,<sup>20</sup> suggesting that the North West has done well in recruiting such a large share of SMEs. This is likely to be a result of the greater use of local delivery partners in the NW and its ability to capitalise on existing local networks and local knowledge. In contrast, Cornwall was recruiting from more of a standing start, though also making use of a local partner (Visit Cornwall) to signpost people to them. For probably the same reason, the NW has supported a reasonably comparable number of individuals as Cornwall (218 and 269 respectively) despite having started a year later. However, working with local delivery partners is not without its own challenges, relationships have to be built and sustained when working in 'someone else's patch' and the experience in the NW has faced such challenges.

While only just over a year old, it is possible that the NW pilot may have already accessed most of the 'easiest' to reach family-owned businesses via the existing local partners. To that end, it will have to put greater resources into extending its reach. This might result in diminishing returns and therefore BtB needs to carefully consider the balance of effort versus benefits to be gained, and whether the North West pilot may benefit from using different delivery partners.

#### 6.4 Which elements of the programme are most effective?

We investigated if the participating businesses found the interventions effective both in terms of their direct experience of the intervention, and the programme's alignment with their personal and business needs. Personal motivations for participation are largely the same in both regions: participants want to increase their networks, take the opportunities offered for learning, and develop themselves as business owners. Business-wise their needs reflect the different types of businesses in each pilot. While all participants want to grow their revenue, Cornwall pilot beneficiaries have a greater focus on improving customer experience, and NW navigating the transition of business ownership.

The majority of participants in both pilots found the activities relevant, well-run and provided opportunities to meet other relevant businesses. In the NW all the different activities offered were well-regarded in terms of their perceived usefulness with a slight bias towards the more intensive activities such as the Advisory Boards and business placements. In Cornwall all activities except the business awards, were fairly equally well-regarded albeit with a slightly larger range of opinions.

Due to the incomplete monitoring data for each pilot, we do not know how many participants used more than one activity on offer and we cannot robustly determine if people are 'pulled through' from the lighter touch activities to the more in-depth learning activities. There is some data suggesting multiple use in the NW and the interviews suggest that in the NW there was a greater understanding that individual programme elements were part of a larger programme with a range of other potentially beneficial activities though this might be due, in part to the

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<sup>20</sup> The State of the Nation: The UK Family Business Sector 2018-19, an IFB Research Foundation Report prepared by Oxford Economics [https://www.ifb.org.uk/media/3995/ifb\\_rf\\_report\\_2019\\_lr.pdf](https://www.ifb.org.uk/media/3995/ifb_rf_report_2019_lr.pdf)



availability of other BtB programmes (e.g. Productivity through People) in the region, while this was less the case in Cornwall.

## 6.5 Benefits and outcomes from the pilots

The NW pilot only started in early 2019 and therefore, for many participating businesses it is too soon for any changes made to have resulted in performance changes. The same is also true but to a slightly lesser extent for the Cornwall pilot that started in early 2018. Nevertheless, the process evaluation gathered some evidence of benefits achieved to date across the spectrum from outputs, to outcomes and impacts. In line with the theory of change and the programme's objectives, we sought participants' views on improvements in their knowledge (outputs), skills (outcomes), any business changes made as a result (outcomes) and any business performance improvements achieved (impacts). The majority of interviewees reported some form of benefit (two-thirds in Cornwall, all in the NW). As would be expected at this point, most interviewees reported effects at the output level – half the interviewed participants reported improved knowledge and confidence in how to improve their business, with a much greater effect in terms of improved knowledge reported in the NW (87% of participants). A little under half (47% in the NW, 42% in Cornwall) of interviewees each in pilot reported having already made changes to their businesses – this is a considerable achievement given the short time period that the pilots have operated for, while a number in both pilots also anticipate making changes in the future instead. Lower proportions of interviewees reported having already achieved business performance improvements (20% in the NW, 13% in Cornwall). Importantly, though around 30% expect to see future improved business performance. This indicates that the programme mechanisms are not only enabling learning and changed practices but also actual and potential business performance improvements for a not insignificant number of businesses in each region.

Businesses of all sizes reported benefits, with small (10-49 employees) businesses reporting benefits more frequently than other sized businesses. This may suggest that small firms may be particularly suited to but, as we do not have accurate size information for all participants, we cannot ascertain if this a systematic effect or not. In Cornwall, achieving benefits appears to be more dependent on attitude and mindset of the individuals participating, with more junior staff with limited managerial experience to date, being most enthusiastic about the programme. This might simply reflect how this group has more to learn and possibly more time to participate than the business owners and more senior staff. It may also suggest that the CN 'offer' isn't quite right for business-owners /more senior staff, or is perhaps perceived that way by them.

The sample is also too small to draw robust conclusions about the relative effects of different activities, but the more in-depth activities (action-learning in Cornwall and Advisory Boards in the NW), were particularly valued by interviewees, particularly when they involved experienced business leaders.

In terms of the attribution the benefits to the pilot programmes (additionality)<sup>21</sup>, in the NW the additionality appears high - around two-thirds of interviewed participants reported that none or only a small proportion of their reported benefits would have occurred without the programme. This points to a successful pilot programme - one that has been well-designed, well-targeted and delivered effectively. In contrast, the results for Cornwall are more concerning as the additionality is rather low, with only around a fifth of interviewed participants reporting that 'only a small proportion of the reported benefits would have occurred without the programme.'

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<sup>21</sup> We should note that these conclusions are based on self-reported additionality (as reported by interviewees)



although there was some evidence that the programme accelerated business changes, giving participants the extra impetus to make changes they had planned or had in mind.

In Cornwall, business performance improvements have typically involved finding new customers or suppliers via the programme's networking activities directly; while in the North West there was more evidence of learning and skills development and applying them to generate performance improvements. This suggests that the hospitality businesses in Cornwall are responding to the programme, and presumably to their wider business context, in a much more short-term and transactional manner than in the North West where there is evidence of learning and longer-term mindset changes.

## 6.6 Sustainability

In the North West, there is more of a sense of the pilot having helped create a network- half the interviewees reported feeling part of a network while the other half were optimistic about making lasting contacts. In Cornwall the picture is less positive, again around half expect to continue interacting with the businesses they met, but the other half are more sceptical about the benefits of continued interactions.

However, even for the NW it is not clear if any mechanisms are planned by BtB or its delivery partners to stimulate continued interactions or if the premise is that it should in future be entirely self-motivated. There may be opportunities for BtB to provide support at a much lower level to an existing business support provider to organise networking events or stimulate businesses (via providing some administrative support, for example) to self-organise learning activities.

## 6.7 Concluding remarks

The two pilots have largely been successful - they have successfully trialled BtB's proposed approach to collaborative approaches to networking and learning. They have also demonstrated that businesses with similar characteristics, be that the sector or key features - hospitality and family-owned in these two cases - are willing to come together and learn from each other. Both pilots have already delivered some benefits at the output, outcome and impact level.

However, there are considerable differences in the (self-reported) attribution of benefits attached to the pilots; attribution was fairly high in the North West but rather low in Cornwall. This would appear to be a result of two factors: (i) the pre-pilot market analysis in the North West ensured that the pilot was designed to closely align with needs and to fill gaps in existing business support provision and (ii) a more transactional attitude to networking and learning among the hospitality businesses in Cornwall, where business gains are often viewed in terms of new customers or suppliers gained rather than improvements in leadership capabilities.

The sustainability of the networks and BtB's role in the region still needs to be considered by BtB. In particular, how long it intends to provide support in a region and what activities, and funding, are necessary to facilitate the sustainability of the networks created.

The pilots suggest that wider roll-out is likely to generate benefits as long as some market research and local consultation is conducted to assess local needs and existing provision, and ensure that the BtB fills gaps and can work harmoniously and/or in partnership with existing business support providers.

Finally, BtB need to improve the processes for, and quality of, programme monitoring data collection to support both programme management and future evaluations.





## 7 Recommendations

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The two Collaborative Networks pilots evaluated were intended to be implemented quickly to provide opportunities to trial the BtB approach and enable 'learning by doing' and as such we make recommendations as to the continuation of the pilots themselves and for wider roll-out.

### The current pilot programmes

- The **NW pilot** appears to have reached a point where the current delivery partners are finding it increasingly difficult to find new members of its target audience of family-owned businesses. The time and resources needed to recruit for them to recruit many more members of this target audience may not be proportionate to the benefits. Therefore we recommend that BtB works with the existing local delivery partners to identify (i) how more family-owned businesses might be identified and reached; (ii) if there are additional needs and new support services that could be delivered in the region to businesses already assisted (while being cognisant of state aid rules); (iii) any light-touch support that might be needed to maintain the new networks established. If none of these avenues are likely to generate many more clients, then BtB may wish to consider using alternative or additional delivery partners that could offer reach into new locations and/or new businesses.
- We understand that relationships between BtB and some of its delivery partners in the NW have not always been smooth. However, as the evaluation has found that working with local delivery partners is an effective and efficient way of identifying needs and recruiting participants, it is important to understand what underlies the problems encountered. Therefore we recommend a post-pilot review with delivery partners that focuses on learning and how to improve relationships in future versions of the programme.
- In the **Cornwall pilot** the additionality of the benefits created to date appears to be low. However, personnel changes have led to a revised approach to the pilot - to participant recruitment and the nature of masterclasses in particular. As these changes only came into effect in November 2019 they were not tested by the evaluation. We recommend another short review in several months' time to assess whether the pilot's additionality has improved since the November 2019 relaunch.
- The pilot was launched in Cornwall on the basis of existing institutional links and an opportunity to kick-start a pilot and to quickly start learning 'what works'. BtB have the intention to scale-up activity in the hospitality sector in other regions and the current pause in activity in the sector caused by COVID-19 provides BtB with an opportunity to work with local and national hospitality experts to better understand how to best support the sector (what its needs are, the most appropriate mechanisms for support, filling gaps in existing support) and determine whether the Cornwall pilot needs modification and how best to deliver to the sector in other regions.

### Wider roll out of Collaborative Networks

The two Collaborative Networks pilots evaluated were intended to be implemented quickly to provide opportunities to trial the BtB approach and enable 'learning by doing' and as such we make recommendations as to the continuation of the pilots themselves and for wider roll-out.

#### Market research - look before you leap

- The NW pilot demonstrates that Collaborative Networks can be beneficial and therefore there is the potential for wider roll-out. However we recommend that BtB undertake the following considerations before doing so:



- Continue to focus on a specific sector or type of business such as family-owned businesses in each region. As already noted, businesses feel they can learn more from other businesses if these businesses have similar aspirations, experiences, or concerns. The NW pilot has shown 'similar' businesses do not have to be in the same sector and the Cornwall pilot has shown that businesses from the same sector are willing to come together to learn. However working in the same sector does create the challenge of balancing similarity of businesses to ensure relevance of learning with unwillingness to share information with potential competitors, and any sectoral model needs to be carefully designed and operated sensitivity.
- Conduct market research and local consultation before starting a pilot to determine which sectors predominate and/or need help, what local needs are, what business support services are already available and who delivers them and therefore how BtB might fill gaps in provision and partner with local bodies. In some regions business support is a rather crowded space<sup>22</sup> and there is no benefit in duplication. When working sectorally, consider consulting with national trade bodies as they are acutely aware of the challenges their sectors face.

### **Programme design**

- The evaluation does not provide strong evidence to suggest that any specific activities are better than others (albeit this is something that a future impact evaluation should test, especially once more time has elapsed). Instead, it appears that the central ingredient to programme success is bringing the right people together to interact and learn from each other.
- Collaborative Networks should remain a series of locally focussed interventions. In both pilots, we found that programme engagement is greatest where participants do not have to travel far to events, while networks are more likely to be sustained long-term when participants are geographically proximate. Geography may also be a common characteristic that can help bring different businesses together. While one area may want to take the basic blueprint of a CN approach in another area, all CN interventions should be tailored to fit the local context and needs.
- When designing further local versions of the Collaborative Networks programme, we recommend that BtB should ensure that:
  - There is a balance of lighter touch and more in-depth learning activities. The former may help provide an opportunity to bring people into the programme, and potentially act as a recruitment tool for other pilot activities. Equally importantly however, lighter touch activities will provide an opportunity to help identify the individuals and businesses that might benefit most from the more in-depth activities, ensuring that only the most appropriate businesses are put forward for them
  - Sufficient effort is put into identifying appropriate high quality business leaders to lead knowledge sharing and learning activities
  - Ideas on designing knowledge sharing and learning activities is shared across Collaborative Network to widen the pool of potential offerings (e.g. Advisory Boards, tools and techniques that increase effectiveness of peer-to peer learning methods, etc) - designs that are in-depth but relatively short in duration are most popular with businesses
  - Where appropriate, alumni from other Collaborative Networks are involved in programme delivery

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<sup>22</sup> LEPs, Enterprise Zones amongst others



- They are aware of other local services to signpost businesses to if/where Collaborative Networks programme is unable to provide the support they need
- They consider what activities, if any, are necessary to facilitate the sustainability of the networks created.

### **Programme management**

- BtB would benefit from the implementation of more robust and consistent monitoring data for the programme, and therefore we recommend that BtB develop a set of indicators for the programme that capture key data corresponding to the various stages of the theory of change (inputs, activities, outputs, outcomes, impacts). It will also be helpful to know how each participant came to hear about the programme, and each activity they participated in.
- Implement process to capture relevant data on programme participants. This may require the inclusion of data capture in contracts with delivery partners. Data collection will, of course have to be compliant with GDPR. At minimum the data required are: the business name; which activities they participated in and when they participated. Evaluations are increasingly using secondary sources of data (business databases) to track the performance of those accessing publicly funded businesses support and therefore details of business characteristics are needed less frequently. The business name (and ideally their Companies House ID number) is all that is required. Nevertheless it is much more helpful to have individual contact details of individual and an opt-in agreement to future evaluations to enable the future qualitative data collection.



## Appendix Methodology

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This appendix provides a more detailed description to the study methodology as already presented in summary form in Chapter 2. We adopted a mixed method, triangulating evidence from a variety of quantitative and qualitative resources as outlined below.

### Phase 1 – Inception and scoping

#### *Stakeholder scoping interviews*

We undertook six largely unstructured interviews with stakeholders to help better understand the background to the programme and the two pilots, the strategic aims and objectives, and to learn about how pilot implementation has fared. The findings from this work strand helped develop some of the assumptions underpinning our updated logic models, and helped to frame the questions used in the participant interviews.

Five interviews took place with BtB stakeholders, including senior organisation-level leadership, staff overseeing data collection, and staff responsible for co-ordinating the respective pilots. One further interview took place with a BEIS representative, providing more of a strategic level overview of BtB and the programme overall.

#### *Interviews with delivery partners*

We also undertook three largely unstructured interviews with three pilot delivery partners (two in Cornwall, and one in the North West). This helped us learn more about the context shaping each pilot, how pilot implementation had fared, plus some early views on how beneficiaries might have benefited from their involvement in it.

#### *Revisions to the Theory of Change*

Draft theories of change already existed for the two pilots (produced by BtB) and for the whole programme (produced by Technopolis) prior to the study's commencement. Reflecting on points raised across all the stakeholder and delivery partner interviews, we updated all three logic models, underpinning the design of the participant interview topic guides, as well as forming the basis for an assessment as to whether BtB had implemented the programme as originally envisaged.

### Phase 2 – Research

#### *Programme data analysis*

BtB provided the study team with a variety of programme and pilot level data to help us better understand how they implemented the programme, who benefited from the programme, as well as some beneficiary feedback on different events and activities. Data types included:

- Programme expenditure details
- The types of activity run
- Total beneficiaries receiving different types of support
- Location of beneficiary businesses
- Size and sector beneficiary firms

We analysed this data to help us better understand the extent of each pilot's reach, the types of business it had supported, and the attendance levels for the different activities run.



### *Participant interviews*

Drawing on the information collected during the inception and scoping phase, we developed bespoke interview guides for beneficiaries of the two pilots (see following appendices). The study team designed the interviews to be semi-structured in format, containing a series of closed questions to help capture some quantitative feedback or core elements associated with programme delivery and impacts, while also contained some more open questions to enable respondents to provide more nuanced and detailed feedback on specific elements of their pilot.

As mentioned previously in this report, the participant interviews have provided the core dataset for the study, supplying both quantitative data on programme implementation and the benefits realised from pilot participation, as well as more qualitative data that helps provide more detailed and complete answers to the research questions.

Both for both pilots, BtB compiled a list of potential interviewees based on those that they believed had engaged most with the respective pilots (the assumption being that those who had engaged most would be best placed to provide meaningful pilot and programme feedback). Following agreement with the client group, we agreed to undertake a minimum of 40 interviews with at least 15 coming from Cornwall and 10 from the North West. In total, the study team completed interviews with:

- 24 individuals in Cornwall, having sent invitations to 93 (a 26% response rate)
- 19 individuals in the North West, having invited 66 (a response rate of 28%)

### **Phase 3: Analysis and reporting**

We brought together the findings from Phases 1 and 2, developing a report that sought to answer the set research questions both at the pilot and programme levels. We also used the findings to help developed a series of delivery recommendations for BtB, including suggestions for future monitoring strategies.



# Be the Business Collaborative Networks Process Evaluation

## Participant interview guide - Cornwall

Thank you for agreeing to participate in this interview about Be the Business' Collaborative Networks programme. Be the Business has appointed Technopolis to carry out a process evaluation of the programme. It will examine how far the programme has delivered against its aims and objectives, how well the programme has been implemented, as also examine early programme impacts.

As part of our study, we are approaching a number of programme participants for a 20 minute interview to understand the precise nature of their involvement in the programme, how well they feel the programme is run, and what the programme has helped businesses achieve to date. All information provided will be treated in the strictest confidence and in an unattributable manner.

### Confidentiality and data

*Interviewers are asked to share with the interview the following information regarding privacy and data management.*

None of the questions asked in the interview are mandatory and interviewees can end the interview at any point. Indeed, interviewees are free at any point during the study to request the withdrawal and deletion of any details or information provided to the study team.

*Technopolis Group provides independent, evidence-based research to support policy makers across the world. We take steps to protect interviewees' personal information and follow procedures designed to minimise its unauthorised access or disclosure.*

*For further information on interview rights and how to contact us, please refer to our Privacy Notice at <https://www.technopolis-group.com/privacy-policy/>*

### Introduction

*Interviewer to read the following: We have had a look at your company's website and will ask you a few further basic details about your business at the end.*

### Your understanding of the programme

1. What do you see as being the purpose and objectives of the Collaborative Networks Programme for Hospitality?
2. To what extent is it different to other programmes that you are aware of or have participated in? *[Note to interviewer – we are particularly interested in understanding whether the participants are involved in any other business networks]*

### Programme involvement

3. Please can you describe how you came to be involved in the Networks Programme
  - a. How did you become aware of the Networks Programme?



- b. How did you find the application process?
4. What were you hoping to achieve from your Networks Programme involvement?
5. To what extent did the Networks Programme match you with appropriate businesses?

### Programme feedback

6. Please can you confirm which of the Network Programme's activities you have participated in? *[Note to interviewer – read all the options below if necessary. In the write-up template, tick all the options that are applicable]*
  - Masterclasses
  - Action learning programmes
  - Business awards
  - Hospitality Hacks campaign
7. For each activity that you have been involved in, please can you rate how useful they have been out of ten? *[Note to interviewer – 10 is the most positive score]*
8. Are there any elements of the Networks Programme that you feel need improving or changing? If so, why?
9. Are there any elements that have worked particularly well? If so, why?

### Programme benefits

10. How relevant has the Networks Programme been for your personal and business needs? *[Note to interviewer – please ask this as an open question but in your write-up, please also select the most relevant of the categories below]:*
  - Not at all relevant
  - Partially relevant
  - Somewhat relevant
  - Very relevant
  - Completely relevant (i.e. all personal and business needs addressed)
11. What benefits has the Networks Programme helped you achieve? *[Note to interviewer – please ask this initially as an open question. The list of benefits below serves as a checklist – please ensure you can confidently answer Yes/No for each one in the write up template]*
  - Feel more knowledgeable about how to improve their business performance
  - Feel more confident about how to improve their business performance
  - Improve management skills
  - Improve leadership skills
  - Have already made changes to the business (e.g. change growth plans, changed management practices, shared knowledge with colleagues)
  - Anticipate making changes to the business in the future
  - Believe their business' performance has already improved (e.g. sales, turnover, risk appetite, investment)
  - Anticipate improved future business performance
12. To what extent could you have achieved these benefits even without involvement in the Collaborative Networks Programme for Hospitality? *[Note to interviewer – initially an open question but press for them to select one of:*
  - None of the benefits would have been realised





- *Only a small proportion of the benefits would have been realised anyway*
- *A substantial proportion of benefits would have been realised anyway*
- *Most of the benefits would have been realised anyway*
- *All of the benefits would have been realised anyway*

### Sustainability and connectiveness

13. To what extent have you engaged with businesses you met through the programme outside of a programme setting?
14. How likely are you to continue interacting with the businesses that you have met through the programme?
  - a. What drives this decision?
  - c. *[Where interaction will continue]* What do you think will be the nature of this interaction?
15. Do you now feel part of a business network as a result of your programme involvement? *[Note to interviewer – you can ask this as a Yes/No question. Interviewee might not know what a network is. Please feel free to ask them what their interpretation of a network is]*
  - a. To what extent do you feel that the Networks Programme has helped you feel better connected and part of a wider business community to improve your own business' performance?

### About your business

16. Please could you tell me a few basic details about your business? *[Note to interviewer – please obtain as much of this as you can from company website before interview]*
  - *Number of staff*
  - *Very broad estimate of turnover*
  - *Location*
  - *Sector*
  - *Current priorities for the business*
  - *Age of business*

### Concluding thoughts

17. Are there any other points that you would like to raise?

[Thanks and close]



# Be the Business Collaborative Networks Process Evaluation

## Participant interview guide – North West

Thank you for agreeing to participate in this interview about Be the Business' Collaborative Networks programme. Be the Business has appointed Technopolis to carry out a process evaluation of the programme. It will examine how far the programme has delivered against its aims and objectives, how well the programme has been implemented, as also examine early programme impacts.

As part of our study, we are approaching a number of programme participants for a 20 minute interview to understand the precise nature of their involvement in the programme, how well they feel the programme is run, and what the programme has helped businesses achieve to date. All information provided will be treated in the strictest confidence and in an unattributable manner.

### Confidentiality and data

*Interviewers are asked to share with the interview the following information regarding privacy and data management.*

None of the questions asked in the interview are mandatory and interviewees can end the interview at any point. Indeed, interviewees are free at any point during the study to request the withdrawal and deletion of any details or information provided to the study team.

*Technopolis Group provides independent, evidence-based research to support policy makers across the world. We take steps to protect interviewees' personal information and follow procedures designed to minimise its unauthorised access or disclosure.*

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### Introduction

*Interviewer to read the following: We have had a look at your company's website and will ask you a few further basic details about your business at the end.*

### Your understanding of the programme

1. What do you see as being the purpose and objectives of the programme?
2. To what extent is it different to other programmes that you are aware of or have participated in? *[Note to interviewer – we are particularly interested in understanding whether the participants are involved in any other business networks]*

### Programme involvement

3. Please can you describe how you came to be involved in the North West Family Business Programme?
  - d. How did you become aware of the programme?



- e. How did you find the application process?
- 4. What were you hoping to achieve from your programme involvement?
- 5. To what extent did the programme match you with appropriate businesses?

### Programme feedback

- 6. Please can you confirm which of the programme's activities you have participated in? [Note to interviewer - read all the options below if necessary. In the write-up template, tick all the options that area applicable]
  - *Business placements*
  - *Advisory boards*
  - *Open business days*
  - *Peer learning events.*
- 7. For each activity that you have been involved in, please rate how useful they have been out of ten? [Note to interviewer – 10 is the most positive score]
- 8. Are there any elements of the programme that you feel need improving or changing? If so, why?
- 9. Are there any elements that have worked particularly well? If so, why?

### Programme benefits

- 10. How relevant has the programme been for your personal and business needs? [Note to interviewer – please ask this as an open question but in your write-up, please also select the most relevant of the categories below]:
  - *Not at all relevant*
  - *Partially relevant*
  - *Somewhat relevant*
  - *Very relevant*
  - *Completely relevant (i.e. all personal and business needs addressed)*
- 11. What benefits has the programme helped you achieve? [Note to interviewer – please ask this initially as an open question. The list of benefits below serves as a checklist – please ensure you can confidently answer Yes/No for each one in the write-up template]
  - *Feel more knowledgeable about how to improve their business performance*
  - *Feel more confident about how to improve their business performance*
  - *Improve management skills*
  - *Improve leadership skills*
  - *Have already made changes to the business (e.g. change growth plans, changed management practices, shared knowledge with colleagues)*
  - *Anticipate making changes to business in the future*
  - *Believe their business' performance has improved (e.g. sales, turnover, risk appetite, investment)*
  - *Anticipate improved future business performance*
- 12. To what extent could you have achieved these benefits even without involvement in the North West Family Business Programme? [Note to interviewer – initially an open question but press for them to select one of:
  - *None of the benefits would have been realised*



- *Only a small proportion of the benefits would have been realised anyway*
- *A substantial proportion of benefits would have been realised anyway*
- *Most of the benefits would have been realised anyway*
- *All of the benefits would have been realised anyway*

### Sustainability and connectiveness

13. To what extent have you engaged with business you met through the programme outside of a programme setting?
14. How are likely are you to continue interacting with the businesses that you have met through the programme?
- a. What drives this decision?
  - b. *[Where interaction will continue]* What do you think will be the nature of this interaction?
15. Do you now feel part of a business network as a result of your programme involvement? [Note to interviewer – you can ask this as a Yes/No question. Interviewee might not know what a network is. Please feel free to ask them what their definition of a network is]
- a. To what extent do you feel that the Networks Programme has helped you feel better connected and part of a wider business community to improve your own business' performance?

### About your business

16. Please could you tell me a few basic details about your business? [Note to interviewer – please obtain as much of this as you can from company website before interview]
- *Number of staff*
  - *Very broad estimate of turnover*
  - *Location*
  - *Sector*
  - *Current priorities for the business*
  - *Age of business*

### Concluding thoughts

17. Are there any others points that you would like to raise?

[Thanks and close]



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