

TARGET: WELLBEING PROCESS EVALUATION

PROJECT-LEVEL RESEARCH REPORT NUMBER 1

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1. INTRODUCTION

The Target: Wellbeing (TWB) Process Evaluation is focusing on four levels: portfolio, programmes, projects and individual beneficiaries. This report presents emergent findings from the first round of interviews with Project Managers (at the mid-point of TWB), which were carried out between June and September 2009. All the quotes contained in this section are from Project Managers and key staff and volunteers working on the projects.

It was agreed that the process evaluation should focus on a sample of projects. In selecting these projects, consideration was given ensuring:

- a) coverage across the 10 local areas of the North West
- b) coverage of projects across the three outcome areas of healthy eating, physical activity and mental wellbeing
- c) coverage of 'holistic' projects that explicitly incorporated all three of the outcome areas
- d) coverage of a range of participant demographics

On this basis, the following projects were chosen:

SUB-REGION OUTCOMES	Cumbria and Lancashire	Greater Manchester	Cheshire and Merseyside
Physical Activity	Preston on Wheels [Preston]	Activate [Oldham]	Cycling Enabling [St Helens]
Healthier Eating	IMPACT [Pendle]	Together Steady Cook [Oldham]	Pre-School Nutrition [Knowsley]
Mental Wellbeing	Butterfly Project [Preston]	Women's Wellbeing Project [Manchester]	Pathways to Employment [Ellesmere Port] + Diamond Life [Halton]
Holistic/Cross- Cutting	Living Allotments [Burnley]	Allotments for Community Wellbeing [Manchester]	Grow your Own Over-50s [Liverpool]

2. METHODOLOGY

2.1 OVERVIEW

The process evaluation is informed by a socio-ecological model of health, a theoretical framework that emphasises the interconnections between environment, behaviour and wellbeing, recognising the dynamic interplay between situational and personal factors.¹ It is thus consistent with a psychosocial perspective, which positions the individual in networks of interpersonal relationships, organisations, and

¹ Stokols, D. (1996). Translating social ecological theory into guidelines for community health promotion. *American Journal of Health Promotion*, 10(4), 282 - 298.

social, political and economic systems.² It also accords with a critical realist approach, which appreciates the interplay of context and human agency, acknowledges that knowledge is contingent and contextual, and is concerned to address both 'how' and 'why' questions.^{3 4}

In order to explore these questions effectively, the process evaluation has adopted a qualitative approach, complementing the quantitative impact evaluation being undertaken by North West Public Health Observatory (NWPHO). A qualitative approach is appropriate for studying people within the context of organisations and communities and for exploring the meanings that people bring to their experiences and interactions.⁵ A range of methods will be used, including interviews, focus groups, observation, photography and documentary review.

2.2 1ST STAGE PROJECT-LEVEL RESEARCH: METHODS

It was agreed that the first stage project-level evaluation would focus on the processes involved in project initiation, development and implementation, with the intention of building understanding of why and how particular interventions work (or don't work) well in different circumstances. The interview schedule (see Appendix 1) was thus structured to explore facilitative and constraining factors; participants recruitment; understandings of wellbeing; connections between the three outcome areas; and organisational relationships.

2. EMERGENT FINDINGS

2.1 OVERVIEW

Key themes emerging from the data gathered through the first round of interviews with the project managers are:

- Benefits of participation
- Concept of wellbeing and connections between outcome areas
- Relational issues
- Beneficiary recruitment and retention
- Organisational and human resource issues
- Sustainability
- Evaluation and administration issues

2.2 BENEFITS OF PARTICIPATION

Whilst the next stage of the process evaluation will include a specific focus on the experiences of project participants, the interviews with project managers revealed important insights into the perceived benefits to participants of the projects.

² Froggett, L. (2002) *Love Hate and Welfare: Psychosocial Approaches to Policy and Practice*. Bristol: Policy Press.

³ Bhaskar, R. (1975) *A Realist Theory of Science*. Harvester: Brighton.

⁴ Connelly, J. (2001) Critical realism and health promotion: Effective practice needs an effective theory. *Health Education Research*, 16: 115-120.

⁵ Denzin, N. and Lincoln, Y. (2008) *The Landscape of Qualitative Research*. 3rd Ed. London: Sage Publications.

On a general level, there was a sense that many participants had benefited through joining a group and connecting with other people involved in the projects:

“They [the participants] seem to be enjoying it. They’re getting the chance to get together with other [groups], realise that their problems are shared by others, a network already exists but this forum is more informal, they can chat around issues.”

“We’ve had feedback from families who’ve taken part saying that they’ve really benefited from it and it’s changed their lifestyles, they look at activities in a different light. Most do seem really eager to try other things, especially those who come back as volunteers.”

“I had a lady who couldn’t get out of bed, now she’s going on a course to be a volunteer, and her medications reduced. One guy who’s clinically obese has lost two stone...”

An anecdote from a cycling project highlighted the importance of confidence-building as a precursor to active participation in the project:

“We’re just constantly building their confidence...There were twelve of them, all in one family [and by the last session] all of them had learned to ride their bike. We were jumping for joy, ‘cos you could see how it had affected the family. And the whole family can join in other activities now.”

2.3 CONCEPT OF WELLBEING AND CONNECTIONS BETWEEN OUTCOME AREAS

2.3.1 Wellbeing

Project managers were asked what they thought of and understood by the term *wellbeing*. Despite the conceptual work developed by the New Economics Foundation as part of the National Evaluation of the Big Lottery Wellbeing Programme (see Figure 1), it was apparent neither this nor other models of wellbeing have explicitly been incorporated into the project designs.

Whilst most project managers had engaged to some extent with the concept and understood their project to fit under the wellbeing ‘umbrella’, the concept was, perhaps not surprisingly, viewed in a variety of ways – with some interviewees more ambivalent than others:

Figure 1: Model of Wellbeing



Source: Abdallah, Steuer, Marks and Page, 2008

“Wellbeing absolutely fits. We’ve always worked in areas of mental wellbeing.

The first time I really heard [the term ‘wellbeing’] was at a brief intervention course. It just seemed to be an add-on, a term you stick with health.”

Interviewees largely discussed wellbeing in relation to mental health, with conceptions tending towards the *eudemonic* (i.e. a self-realisation of a reaching of individual potential) rather than the *hedonic* (i.e. the pleasurable experiences of participants).⁶ One project manager, however, reflected on the latter understanding, commenting that:

“The thing about wellbeing is that we will never be able to make everyone entirely happy.”

In the following quotes, from a healthy eating and a holistic project respectively, the important contribution of inter-personal relations to wellbeing is highlighted:

“It’s about getting out of the house, it’s about routine and being part of something within their community...It’s about feeling useful...”

“Somebody with a mental health problem, that’s very inward. To have something that you have to look after, if you’ve got a pot of seedlings, it just starts to break open your world a bit and it just shows what sort of impact it can have on someone’s life.”

2.3.2 Links between outcome areas

Due to the reporting and monitoring requirements, projects have mainly aligned themselves to one of the three project outcome themes (healthier eating, physical activity, mental wellbeing), despite often considering their project to be more holistic and thereby implicitly reflecting the New Economic Foundation model referred to above:⁷

“Our project hits all three themes, but we put it as ‘healthy eating’.”

“We do evaluate the health benefits in line with Target: Wellbeing: we’re looking at physical health, mental health and wellbeing... We were asked to put them in order of 1, 2, 3, which we chose as physical, mental and healthy eating. Healthy eating is as a consequence of the former two.”

Consequently, it would seem that a number of ‘holistic’ projects were categorised under a theme that did not easily ‘match’ the full range of their activities. For example, one ‘healthier eating’ project also had a strong mental wellbeing leaning based on the social aspect of the group and also featured regular outdoor activities which were not food-related; and a ‘physical activity’ project explained how their project was impacting on the other two TWB themes:

“[As well as our main focus on physical activity] we impact on the eating side. [One] obese guy has changed his own diet, not eating after a certain time of an evening...Another lady is bringing in nutritious soup she’s made for everyone to eat. She’s on her own, so it’s giving her a buzz. Everybody else is thinking ‘I’ll do that!’ ”

2.4 RELATIONAL ISSUES

2.4.1 Relationships with programme managers

The organisational relationships between programme and project managers varied between local areas. However, whether the relationship was close or distant, it was generally reported favourably:

⁶ Ryan, R. and Deci, E. (2001) On happiness and human potentials: A review of research on hedonic and eudaimonic wellbeing. In: Fiske (Ed.) *Annual Review of Psychology*. Palo Alto, CA: Annual reviews Inc.

⁷ Abdallah, S., Steuer, N., Marks, N. and Page, N. (2008) *Wellbeing Evaluation Tools: A Research and Development Project for the Big Lottery Fund. Final Report*. London: New Economics Foundation Centre for Wellbeing.

“We have a very positive relationship with the programme manager. There is lots of help with the financial stuff. [The programme manager] passed on info’ from interested potential participants for [the project coordinator].”

“We have monthly meetings...so we support each other throughout those meetings, they [the other projects] all link apart from mine (because of the specific focus). [The programme managers] host the meetings and are very supportive. We know we can access [them] when we want to.”

“All the project managers meet on a major basis, share ideas, whinge! we get a lot of support from the programme co-ordinator. Our strongest relationship is with them.”

Where there was little or no contact with programme managers, this was either due to the specific organisational structure meaning that this particular communication was handled by an overall manager, or that the projects made a conscious choice to have minimal contact:

“I can’t remember who the programme manager is...I don’t have much contact ‘cos I don’t need them...I quite like being autonomous.”

Only one project spoke of wishing to have *more* contact with the programme manager:

“I think I could’ve done with more support. I’ve seen [them] twice this year. [They] stopped having the Target: Wellbeing meetings. We’ve just started having them again because I think Groundwork [North West] were getting concerned.”

The downside to minimal contact with programme managers was that this occasionally led to a degree of confusion and/or cynicism:

“I think one of the problems for project managers...is that we’re not quite sure what [programme managers are] there for.”

“I don’t understand the [programme manager’s] role. Does it not seem an unnecessary amount of bureaucracy that is taking money away from the project?”

2.4.2 Relationship with Groundwork North West

In reflecting on their relationships with Groundwork North West, project managers were generally positive, with a number commenting that they frequently e-mailed Groundwork for help and received appropriate support. The training sessions were also generally thought to be useful, particularly for more inexperienced project managers:

“I’ve been on a couple of the training sessions, we’ve had offers of support with evaluation and reports, I’ve not done that kind of thing before. I’ve not had a lot of contact but I am aware that they are there if I need them.”

However, one project manager described a lack of support after being brought in to manage a project designed by someone else – although they also admitted that they had only phoned Groundwork North West for help on one occasion:

“Me as a new person coming in, even though you get the file, I think it would be good if someone came down. Sometimes I look at it and some of the figures are wrong and I don’t know why. I don’t feel like I’ve really had that support.”

There were further issues relating to the geographical location of Groundwork North West, which was obviously better suited to some projects than others.

2.4.3 Relationship with North West Public Health Observatory

With regard to relationships with North West Public Health Observatory (NWPHO), a level of frustration was apparent – mainly due to issues relating to the evaluation. Criticism from project managers highlighted the massive differences between the projects, a desire for autonomy and a perceived lack of engagement and empathy:

“There have been a lot of changes, mainly by the NWPHO, and we have tried to adapt to their needs as much as possible. NWPHO have been tasked to do something without really having a grasp of what the frontline is like, I think that presents more restrictions than opportunities...They've come at it with a very one size fits all approach and what's happened is as time's gone on they've realised they're not getting the information they need. I don't think they understand the project.”

However, there was also a recognition that NWPHO were, at least in part, responding to parameters set by Groundwork North West and Big Lottery – and that it was unreasonable to expect them to be able to tailor evaluation tools to more than 90 separate projects. Additionally, a number of project managers specifically highlighted how useful they had found the evaluation 'troubleshooting' sessions run by the evaluation team.

2.4.4 Relationships with other projects

Of the 13 projects comprising the process evaluation sample, most were working in isolation from other TWB projects addressing similar issues or themes, though many had connections with congruent local projects funded from a different source. Some project managers spoke of a desire to connect with and learn from similar projects, but as these were more often than not in a different geographical location, time constraints placed on project managers meant that (outside of events organised by Groundwork North West) they were unable to pursue these connections.

It was notable that the cycling projects were beginning to explore the potential for future networking:

“There are a lot of cycling projects in Target: Wellbeing...There is a lot of potential to work quite closely with those projects.”

“I've not had much contact with other project [but] it was suggested that we could take participants to other Target: Wellbeing projects that do cycling.”

2.5 BENEFICIARY RECRUITMENT AND RETENTION

The majority of project managers were confident that they were meeting their target numbers (which were self-defined in original project bid outlines), but several spoke of recruitment occasionally being a 'struggle'. In some cases, there was an admittance that it had been difficult to predict how many beneficiaries projects would secure, leading to speculation and guesswork. Other project managers reflected that they had inherited project proposals with what they viewed as unrealistic beneficiary target numbers.

Beneficiaries have been recruited using a variety of methods, including:

- advertising in local newspapers
- project information and key staff being visible at local health events
- networking with neighbourhood renewal groups and forums
- hosting taster sessions
- word-of-mouth from beneficiaries to other community members.

It was clear that some projects are better positioned to use certain methods than others. For example, managers from two cycling projects explained the value of community health events:

“It's visual, we're all bibbed up, we've got helmets on. At stopping points we talk to people and they're like 'what are you doing? Can we join in?'”

"[Many beneficiaries were] got through a health event we did on the sport health checks and there were really big queues. Then we got them on the rides."

For one mental health project, there was a concern that potential participants may over-identify TWB with the local PCT and transfer negative perceptions or experiences onto the project – thereby impacting negatively on recruitment:

"One of my worries, is that some of them have had negative experiences with the PCT. I keep reiterating that Target Wellbeing is different. They are not aware of the macro, they can't see these big organisations, it's hard enough for some of them to get on a bus."

For a project where the primary beneficiaries were themselves volunteers, recruitment was much easier as on the whole, with potential volunteers contacted the service with a desire to be involved, rather than having to be sought.

Other projects have discovered that recruiting beneficiaries is only the first challenge, with retention also being an issue that needs to be addressed by facilitating access. As a mental health project manager explained:

"To generate networks and groups we need to use a minibus and shared travel. Things like travel expenses are a factor. They might not be that far away, but it's awkward and can be expensive. Every penny does count, so to be able to support people with a bus pass or childcare facility is important. It might be the only time they're not one-to-one with their child for the whole week."

2.6 ORGANISATIONAL AND HUMAN RESOURCE ISSUES

2.6.1 Organisational restructuring and staff turnover

Alongside concerns about retaining beneficiaries, a number of project managers highlighted the significance of organisational restructuring and staff turnover.

More than half of the project managers did not write the original project proposals, and in many instances the staff who did had since left the organisation. This has obviously impacted on the projects in several ways, as illustrated by the following quotes – which are each from a different project and span all three TWB outcome areas:

"I came into post last June. The bid was put in before I came into post. I haven't got a lot of detail about the bid process."

"I didn't write the original bid, I was working on a different job. The person who wrote it is not here, there was a restructure...There has been quite a few changes of staffing since the inception."

"We had a complete change of staff at the end of the first year. There was nobody trained to run the course so we stopped it for winter and started it up again with difficulty."

"The department has recently had a reshuffle...We've just sorted out in the last week or two whose roles are whose."

These indicative quotes highlight how widespread an issue staffing turnover is and point to the challenges raised for projects. Frequent changes in staffing was explained by more than one project as the constant state the voluntary and community sector find themselves in.

2.6.2 Volunteering

It was apparent that projects used volunteers in a variety of ways. A number were run by organisations that had experience of recruiting and using volunteers as their main staffing resource – and in some instances the main beneficiaries were trained volunteers:

"There are 37 volunteers who are all checked and have done the training. These are the beneficiaries...A lot of the volunteers have been here a good many years."

However, others had introduced a 'progression' system whereby project participants could go on to be trained as volunteers:

"By doing the course we can link people, and give them the opportunity to come on as a volunteer. We've had two people come through on the course who are now volunteers."

It was evident that the challenges of staffing recruitment and retention were at times compounded in projects that relied heavily on volunteers, as this could add an additional layer of uncertainty:

"[We're] trying to target the biggest areas of deprivation...We can struggle to get enough volunteers occasionally."

"Sometimes projects are not sustainable because volunteers do not want to take on a role that was previously done by a worker. "

This particularly affected projects that aimed to run during normal working hours using volunteers who also worked full-time (one cycling project spoke of this as being a particular element in delaying their project start date).

2.7 SUSTAINABILITY

The continuation of projects beyond the TWB funding period was very much at the forefront of concerns for many of the project managers. For some who were connected with larger organisations such as the local PCT, there was confidence that the project would continue:

"I know that after this funding has finished, the schools will pay for it to be there as it's benefited the schools. This won't die when the project's finished."

For others, the uncertainty was a cause of anxiety and frustration, sometimes reinforced by previous experiences of projects petering out when funding dries up, and the subsequent negative impacts on participants:

"The participants [have] said 'is this going to continue?'...Participants are enjoying it that much they don't want it taking away from them... where do we go when the funding's finished?"

"It can be quite frustrating...funding coming to an end. You've got to stop, you know, there's a full stop there. [I'm used to] relatively short term funding. Every time the funding comes to an end, you have to tweak projects and take it in a different direction, wherever the funding is. That is extremely frustrating."

2.8 EVALUATION AND ADMINISTRATION

2.8.1 Evaluation issues

Evaluation proved to be a major recurring theme, provoking a range of reactions from project managers.

In terms of the overall evaluation process, several project managers felt that it was unnecessarily onerous and compared TWB unfavourably to other projects – one describing other funded from other funders as having '*simpler evaluation*' requirements and another commenting that:

"Getting the forms out and returning them has been a pain...there is so much administration to deal with [in the project] that another piece of paper to give out seemed inappropriate..."

Some projects commented that they lacked the facilities to administer easily the paperwork required, with special arrangements needing to be put into place. For example, one cycling project manager circumvented the problem by organising introductory sessions at other venues:

"We're [based] outdoors and we don't have a specific venue for administration. Because the weather can be bad, we've actually built in a mini-evaluation morning when the course starts to get that questionnaire filled in just so we know everyone's completed it."

There was also concern that the support required by some beneficiaries to fill in the entry and exit questionnaires impacting on carers' workloads:

"For those who are disabled, their carers come with them but were looking to bring more participants along. When you think one carer can be in charge of several people, that's a lot of forms to fill in!"

Responses to the evaluation forms themselves were also mixed. Some project managers saw them as useful and time-saving, as they did not have to design them themselves or they lacked sufficient experience in evaluation to know what data to gather. However, whilst understanding the constraints experienced by Groundwork North West and NWPFO, several others expressed a frustration at having a standardised form imposed on their project and a desire to have had more say in the design of the forms, to make them more specifically relevant to their particular project:

"It would've been good to have had a degree of autonomy in setting the questions relating to the specifics of the projects."

"A lot of the NWPFO evaluation was done without any consultation. We made the effort to go down to Liverpool and Manchester and they need to understand what happens...it's a really practical project this one."

Certain projects encountered no real problems with participants filling the forms in:

"Most people were happy to fill it in for me. The group are...up for everything and they didn't mind doing it."

"As an organisation we are used to gathering information and we want information that is useful. Maybe because we have a history of doing that, we know the approach to get whatever we need and make sure the individuals understand that..."

By way of contrast, other projects deemed the forms to be unsuitable for their participant group or project, a particular concern being the appropriateness to younger participants:

"The questionnaires are quite lengthy, sometimes you wonder if they are actually putting people off. Some of the questions are too personal."

"The questionnaires are repetitive, we have received negative comments from the participants. The eight year-olds find them confusing, and the wording is inappropriate."

"The evaluation they asked me to do is...not suitable for kids...I can't ask children their weight and they haven't got the mental capacity to answer some of these questions."

A further issue highlighted was the difficulty experienced by project participants due to disabilities of language issues – and the confidentiality issues raised by project workers helping in the completion of forms:

"The disability programme – there was no consideration about how people fill out the forms, and for those who are not English speaking."

"Some of the people I've seen are not very capable of writing. If you get ten per cent of the questionnaires back I'll be amazed... Problem is, evaluation forms are supposed to be completely confidential, but some of them can't fill them in on their own."

This challenge was also exacerbated by a lack of capacity to translate the questionnaires:

"We have a translator who attends the walks and they've managed to get some basic details, but as for the questionnaire they haven't got the capacity."

It was also clear that the entrance and exit questionnaires were not appropriate for all beneficiaries, due to the variety of levels of participation in the projects:

"We have... courses where people only contact us for half a day in total, and we have other courses here where people have attended for two, three years. So there's... people we never see ever again and people we see every week."

A further issue raised by project managers was that of 'questionnaire fatigue', alongside a concern about duplication, due to projects already having their own evaluation forms in place:

"...it's presenting to the beneficiary a lot of paperwork, a lot of form filling."

"Virtually every question on my [organisation's] initial assessment is duplicated in the TWB one. I think people get a bit fed up of the repetition."

Additionally, there was concern that the projects and host organisations would not obtain relevant information from the TWB evaluation forms:

"The kind of info NWPHO want isn't necessarily the same we want to improve our practices."

The upshot of all these practical issues has been that some of the projects have – with approval from Groundwork North West – decided not to use the evaluation forms. This has only been in exceptional circumstances where project managers can demonstrate that they have a more suitable alternative method of evaluation in place:

"I'm not having to do the NWPHO questionnaires...so long as I can provide case studies showing effectiveness."

"We don't use the evaluation forms. We highlighted from the beginning that we didn't feel that they were appropriate in structure or content for our beneficiaries. We put together and entry and exit questionnaire of our own...If somebody comes along on a workshop, we will evaluate it and ask specific questions and that will benefit us."

Although not asked specifically about the process evaluation, several Project Managers reflected on the interview as a useful place to discuss issues confidentially to raise issues not covered in the main evaluation:

"It's good to talk about the project and not have loads of fixed questions..."

2.8.2 Administration issues

More generally, the extent to which the administrative element of TWB was perceived to affect projects negatively differed markedly – with some project managers stating that there were '*no real issues*' and others talking about the '*frustrating experience*'. Whilst there was an appreciation of the demands placed upon Groundwork and NWPHO, administration associated with project reporting was a key emerging theme. The perceived weight of these administrative demands (for instance, in terms of inputting project data to NWPHO's dedicated website) depended particularly on the capacity and computer-literacy of the project team – and administration tended to have the biggest impact on those projects which hadn't adequately budgeted for it:

"We underestimated our administrative costings...If we had more admin support we could run it for another year...We didn't cost any of the admin in, [which was] probably a bit naïve..."

It was seen as less of an issue when projects had either budgeted adequately or had ability to access other funding sources through their organisation. This usually meant that larger projects, or ones affiliated with larger organisations, were coping with the administrative workload more effectively than smaller projects run by small organisations. As one interviewee mused:

"I wonder, is all the administration stuff around this work costed properly – and if not who pays for that? It seems like an awful lot of work on that, especially for smaller projects."

The quarterly report set up was also not suitable for some projects, particularly if they were working with seasonal projects such as those taking place outdoors or organisations such as schools.

"I need them to understand that I don't work quarterly – I'm working in an academic year and there's going to be periods where I can't deliver."

APPENDIX 1: PROJECT MANAGERS' INTERVIEW SCHEDULE

Semi-structured interviews will be used with all the main stakeholders: project beneficiaries, delivery workers, project managers and programme managers. They will be conducted with programme managers at early and mid points; and used as part of a portfolio of methods with project stakeholders.

The interview schedule/aide memoir for the semi-structured interviews will include the following considerations:

- stakeholder perceptions of wellbeing and how these may change over the course of the programme/project
- stakeholder perceptions of relational issues relevant to the individual programmes/ projects selected
- issues concerning management and resourcing (e.g. differences between third sector- and PCT- led projects)
- any anticipated 'added value' in relation to the Target: Wellbeing outcomes.

Specific questions for managers and key staff will include:

- Describe how progress along anticipated change pathways is enabled or constrained at different stages in the Target: Wellbeing cycle
- How have connections between the three outcome areas been explored and developed?
- What understandings of wellbeing have influenced different programmes and projects?
- How have programmes worked to build and sustain wider system-level capability and capacity?
- What role has the Target: Wellbeing portfolio network played in supporting and adding value to programme delivery?
- What are the key issues concerning project initiation, development and implementation?
- What are the main contextual factors affecting your particular intervention and how do these factors help/hinder the project?
- Is there any 'added value' of your project in relation to the Target: Wellbeing outcome areas and more widely?