



Getting Better by Design

**Evaluation of a programme to support the
voluntary sector in Scotland**

Learning Partner

Jo Kennedy and Cathy Sharp, May 2015



Executive Summary

Better by Design was developed in 2013 by the Big Lottery Fund Scotland in response to the complex and changing landscape for voluntary sector organisations delivering services on the ground with people or communities. It aimed to support a process of change, and prioritised organisations focusing on social care, employability, health and housing where intervening earlier or preventing needs emerging could make a real difference. The programme encouraged sustainability in the widest sense to enable organisations to meet the needs of their beneficiaries better now and in the future.

This has not been a traditional programme either in approach or in funding. Organisations applied for a two-year package of free, intensive, expert and bespoke support rather than for grant funding. The programme piloted design-led approaches which are still an innovative methodology for the voluntary sector and their partners.

The chance to learn in this way and the challenge to habitual ways of thinking and doing, have made a significant change to mindsets in a number of organisations and at times, brought a new quality of engagement in partnership settings. This report shows that design-led approaches do have a great deal to contribute in creating the new organisational cultures of collaboration and mutual learning necessary for public service reform.

Key Findings

- *Better by Design* has been a valued and worthwhile experience for most organisations and demonstrates positive signs of progress towards longer term sustainability and the ability to meet the needs of beneficiaries better now and in the future.
- The majority credit much of this progress to being part of the *Better by Design* programme. As a process, the work is still very much underway, but there are important signs of change and emerging new ways of working.
- Many of these changes are about mindsets rather than radically different models of service provision. They include empowerment of staff, changing attitudes about what is possible, stronger relationships and awareness of interdependencies both internally and with external partners, and new ways to harness insights and experience from staff and service users.
- Organisations are now on a stronger footing to put people who use services at the heart of them, focus on prevention and understand and measure their impact.
- None of the 15 organisations dropped out of the programme; those that thought they might early on, by the end, were glad they stayed the course. And most organisations say they would be happy to do it again, although all have suggestions as to how to improve the programme to make it more bespoke.

Main benefits

- One of the main benefits was the space and time to reflect in a structured and safe way. Such a chance to pause created a different atmosphere, which enabled different kinds of conversations to take place.
- Elements of the design-led process brought to light untapped resources, most notably from amongst staff and showed the importance of the chance for staff to engage with each other, as well as with people that use services.
- Taking time to think about services from a user or volunteer perspective helped to reassert the values that brought many people to their work and created energy, better morale and openness to different ways of working.
- More than two-thirds of the organisations highly valued the design-led approach, experienced real transformation through it and appreciated the design expertise on offer. It enabled organisations to:
 - Harness skills and creativity they already have and connect it to what they need.
 - Explore and take the time to dig deeper, develop true curiosity and open-mindedness.
 - Generate and share ideas through visualisation.
 - Bring the perspectives of people that use services to the fore.
 - Bring internal and external stakeholders together with a new quality of collaboration.
 - Reconnect with values and develop renewed clarity and purpose.
 - Embrace failure (earlier) by trying things out.
 - Be assets and strength focused.
 - Think more clearly about their impact and measure it better.
 - Generate vision and excitement about change at all levels of the organisation.
 - Be more resilient and continue to learn to meet changes and new challenges.

Learning for the future

- Much of the *Better by Design* 'design elements' of the process have worked well, but implementation challenges have meant the programme has not met some organisations needs or been a positive experience for all organisations.
- The programme has highlighted that design-led approaches may challenge prevailing commissioning models. It has illustrated some of the barriers to the adoption of such collaborative and experiential approaches to organisational change, as well as how it can be possible to work with and influence commissioning partners.
- This report is an endorsement of the real potential of design-led approaches and draws out some implications and recommendations to improve the prospects for implementation of similar programmes.

Acknowledgements and thanks

The views expressed in this report are based on the learning partner activities throughout the *Better by Design* programme 2013-15. We would like to thank all the organisations for their willingness to share their experience of this programme, their insights and specific contributions in the form of case studies.

The organisations involved are diverse and complex and we have endeavoured to do justice to the essence of the experience that they have described to us.

We are also grateful to both delivery partners and to the Big Lottery Fund Scotland for their contributions

We remain responsible for any errors or omissions in interpretation and reporting.

Jo Kennedy & Cathy Sharp May 2015

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1 Introduction and context

The aims of *Better by Design* and the purpose of this report

- 1.1 *Better by Design* was developed in 2013 by the Big Lottery Fund Scotland in response to the complex and changing landscape for voluntary sector organisations. Many are now facing increased demand for their services, greater competition for funding and tighter commissioning requirements, including the need to demonstrate their impact in terms of social outcomes rather than services. In particular, the Big Lottery Fund Scotland recognised that small and medium sized organisations were struggling to find the capacity, strategic vision and adaptability to respond quickly to the changing environment.
- 1.2 It is out of this complex need for change that the Big Lottery Fund Scotland developed *Better by Design*, a process of design-led support over two years which aims to encourage sustainability in the widest sense.
- 1.3 Eligible organisations were third sector organisations delivering services on the ground with people or communities in Scotland who were able to demonstrate a commitment to change. Of particular interest were organisations where a shift to intervening earlier or preventing needs emerging could make a real difference, such as social care, employability, health and housing.
- 1.4 This has not been a traditional funding programme. Organisations applied for a two-year package of free, intensive, expert and bespoke support rather than for grant funding. This support has been provided by the two delivery partners, Taylor Haig and the Young Foundation, experts in social innovation and design-led organisational change. In addition, Big Lottery Fund Scotland also dedicated *Investing in Ideas* funds to allow for each organisation to apply for two awards of up to £10,000 each to fund projects arising from engagement with *Better by Design* or to allow members of staff to take part more fully in the design-led process.
- 1.5 This report provides an overview of key messages and learning from the *Better by Design programme 2013-15*. The audience is the wider third sector, Big Lottery Fund Scotland and other funders likely to be interested in the application of design thinking to encourage organisational sustainability for the voluntary sector. It aims to highlight the lessons from this programme in the hope that they can be used to better support communities.
- 1.6 Our role as Learning Partner has been to support opportunities for learning throughout the process, and to enhance understandings of how the process makes a difference to the organisations.
- 1.7 This final evaluation report provides evidence of progress towards the desired outcomes of the programme. The report ends with some recommendations for future programmes for improvement across all aspects of the programme's approach and delivery. In this way, this report makes a

contribution to the debates about the offer of design methods to ‘*advance public and social innovation and achieve creative solutions beyond the reach of conventional structures and methods*’.¹

The offer of design-led approaches

- 1.8 The Design Commission explored the potential of design approaches in public services renewal in Britain.² The culmination of a nine month inquiry involving design specialists and people from the public sector concluded that:

“...often the solutions seem more like common sense than radically new ideas, particularly once things are appreciated from the user point of view. The really hard work is in making the space for change to happen, which is often about paying attention to the internal dynamics of the organisation, sometimes about getting public buy-in, but always about thinking about the behaviours and contexts of everyone interacting with the system.”

- 1.9 The publicity for the *Better by Design* programme offered organisations a chance to be involved in service design:

“Service design means planning and organising people, infrastructure, communication and components of a service to improve it and make it more driven by the needs of its users. Service design can help change an existing service or create new services. It can support you to make changes not just to services but your organisation as a whole. An integral part of any service design is to support a wider change in the culture of your organisation.”

- 1.10 The Big Lottery Fund Scotland were clear that this approach would require a strong commitment:

“Service design is not a ‘quick fix’ - it is something you need to be fully committed to in order to realise the true benefits. While it sounds like just a rethinking of the way services are delivered, it goes much deeper than that - it supports organisations through a process of change, looking at how change can be embedded and how you can be more innovative. It always puts users at the centre of the process and co-designs the solutions to better meet their needs.”

- 1.11 Whilst design-led approaches are often described differently, they tend to share a foundation in four key phases, known as the ‘Double Diamond’ approach. This was developed by the Design Council in 2005 as a simple

¹ Geoff Mulgan, NESTA (2014) Design in Public and Social Innovation What Works and What Could Work Better

https://www.nesta.org.uk/sites/default/files/design_in_public_and_social_innovation.pdf

² Design Commission (2014) *Restarting Britain 2, Design and Public Services*

<http://www.policyconnect.org.uk/apdig/research/report-restarting-britain-2-design-public-services>

graphical way of describing the design process and maps the divergent and convergent stages of the design process, showing the different modes of thinking that designers use.³

- 1.12 The different phases were described in *Better by Design* as: Insight, Inspiration, Innovation and Implementation.

Insight: this is phase of exploration and discovery, using tools such as research, customer journey mapping, stakeholder mapping and the Organisational Health Scorecard. The focus is on discovering and exploring the experiences and views of staff, communities, people who use services, trustees, volunteers, funders and others.

Inspiration: this phase looks at different possibilities and ideas for change arising from insight. It explores the impact and outcomes the whole organisation wants to achieve, who its communities of benefit are and how it wants to engage them, and begins to sketch new ideas for change and services.

Innovation: in this phase, organisations prototype, test and develop changes and services. A key part of this is co-production - developing, changing and improving ways of working with the full engagement of communities of benefit. This phase also explores the business models needed to underpin the effective working of the organisation.

Implementation: in this final phase, the changes and services are consolidated and launched, business models pinned down and evaluation and engagement firmed up.

- 1.13 In essence, these phases involve looking at ‘how things are’ at the moment, finding and exploring the problems, thinking creatively together about what would improve things and prototyping or testing out an idea in the context in which it is expected to be applied, before putting it in place. Importantly, this is an on-going learning process: a design approach acknowledges any ‘solution’ needs to be something that can be changed, tweaked and built upon by the people that use it, as people’s needs, the resources available and the policy and social and economic context changes.
- 1.14 A design approach offers simple frameworks, tools and methods. Design tools aim to put those that use and deliver services at the heart of the process of creating new ways of delivering services, because of their unique and respective expertise. There is constant reflection, adaptation and iteration as ideas are developed, tested, discarded, improved and

³ Design Council (2005)

[http://www.designcouncil.org.uk/sites/default/files/asset/document/ElevenLessons_Design_Council%20\(2\).pdf](http://www.designcouncil.org.uk/sites/default/files/asset/document/ElevenLessons_Design_Council%20(2).pdf)

implemented. Those that have been used in the *Better by Design* programme are available in a dedicated workbook.⁴

- 1.15 There is consensus amongst design specialists that adopting a ‘design mindset’ is crucial, and the tools and methods are just ways of putting this into practice. Whilst the double diamond model may appear to describe a linear process, in reality, the nature of the process and the quality of implementation both create an inevitable ‘messiness’ in the midst of the unfolding process. This kind of experiential, iterative and collaborative process presents a paradoxical challenge to organisations, funders, commissioners and evaluators as it is impossible to define the very specific outcomes at the beginning.

What the organisations were seeking from *Better by Design*

- 1.16 The *Better by Design* process was never prescriptive about the outcomes it expected for organisations. The application process stated:

“We don’t know what the specific changes will be for your organisation. You might develop a new product or service. You might change the way your organisation is governed or managed. You might change your business model. You might forge a new partnership with an organisation working in a similar field or in the same place as you. We do know that whatever the specific changes, you will be in a stronger position to deliver for the people who matter to you, that you will be better able to respond to the changing environment, and that you will be on a firmer path for the future. These are the outcomes we are seeking and will support you to achieve”.

- 1.17 The *Better by Design* Annual Report in July 2014⁵, expressed this vision as principally about two intended outcomes, that organisations will:
- Meet the needs of their beneficiaries better now and in the future, and
 - Be more sustainable in the longer term by being through a process of change.
- 1.18 The organisations themselves highlighted the specific outcomes they were hoping for in their applications to the programme and these have formed a touchstone for learning and evaluation activities rather than a typical monitoring and evaluation framework.
- 1.19 For many, the outcomes sought were both ambitious and comprehensive which reflects both the scope of the programme, and some ambiguity at the outset about what it could offer. Almost all were looking for a stronger business model, to lead to greater sustainability. Some talked about wanting to find a way of getting off the treadmill of applying for funds every year and having to adapt their purpose to meet funders’ requirements; others

⁴ *Better by Design* (2015) Workbook Lynne Wardle (ed) Published by The Big Lottery Fund Scotland

⁵ <http://youngfoundation.org/wp-content/uploads/2014/07/final-bbd-report-pages.pdf>

wanted to develop new services and some spoke of empowering both those who use their services and staff at every level of the organisation. Many were also seeking to become 'learning organisations' - to use the knowledge and experience of service users and staff to drive and inform the work that they do. Progress towards these outcomes is discussed more fully in Chapter 3.

Programme implementation

1.20 The *Better by Design* programme has been delivered by a partnership between The Young Foundation and Taylor Haig. The two delivery partners have adopted different roles based on their specific expertise and capacity. The Young Foundation has been the Programme Manager. Taylor Haig provided on-the-ground support to organisations and stewardship of the overall design process, working with Change Teams, Chief Executives and Board Members within the organisations. The Young Foundation provided specific input in relation to the Organisational Health Scorecard (OHS), research, impact and evaluation. They also helped organisations explore their communities of benefit and different ways of enhancing engagement and empowerment and provided some support on social investment and enterprise.

The approach to learning and evaluation

- 1.21 The Learning Partner has been involved in a limited way in the delivery of the *Better by Design programme* since mid-2013. The approach to learning and evaluation has been to support learning from experience on an ongoing basis for the organisations, for the team delivering support and for the Big Lottery Fund Scotland. The role has been undertaken by us as two individuals working together.
- 1.22 In addition to meetings with the delivery partners and the funder, we have undertaken two rounds of interviews with each of the organisations, between November 2013 and February 2014 and January-March 2015, with some informal contact with them when following up particular issues.⁶ Two case studies were included in the Annual Report in 2014. We have attended *Better by Design* events, meetings of the Chief Executives and the final day of the Academy. A survey of the organisations was undertaken over the summer of 2014 to provide more detailed feedback at that stage. This report draws on all this information and includes further cases studies developed from the recent contact with the organisations to provide some more in-depth perspectives. As part of writing this concluding report, interviews were conducted with both delivery partners in order to test emerging findings and enable their views to inform the development of the recommendations.
- 1.23 The next Chapter provides brief portraits of the 15 *Better by Design* organisations to set the scene. Chapter 3 explores progress towards the outcomes that organisations were seeking and Chapter 4 looks at their

⁶ In the 2015 round of interviews, we conducted 16 group interviews and 3 individual interviews involving a total of 36 people in 14 organisations.

experience of the design-led process in more detail, at what they valued about the process and what was difficult. Chapter 5 develops recommendations based on the perspectives of the learning partner, delivery partners and the organisations.

2 Chapter 2 A Portrait of the *Better by Design* Organisations

- 2.1 This chapter provides short portraits of the experience of each of the *Better by Design* organisations to set the scene for the later discussions of the specific outcomes that each achieved in Chapter 3. Chapter 4 reviews the experience of the design process in more depth.
- 2.2 Each organisation was asked to give a broad reflection on their perspective on the most important ways in which the organisation is changing as a result of *Better by Design*.

Aberdeen Foyer

Aberdeen Foyer, based in Aberdeen, is a company limited by guarantee and registered charity which works to prevent and alleviate youth homelessness and unemployment. Their original focus for *Better by Design* was their housing support service and their desire to ensure a better fit of services to the needs of the individuals. As the programme draws to a close, they are enthusiastic about the *Better by Design* process and the future prospects for the organisation. They speak of greater staff engagement, better motivation and morale. The process has helped to create a safe space in the organisation where people can explore issues and ideas. Importantly the process has helped them to refocus on their values and learning, changing how they think and therefore how they approach new problems.

Senior Foyer staff understand the complexities of making and sustaining relationships with services commissioners and funders. They describe an often shifting picture, subject to constraints, changes in policy and priority, where the Foyer's ambition could be compromised or lessened. Through the *Better by Design* process staff across the organisation have deepened their understanding and learning, developing confidence that they have a process through which they can tackle the current and new opportunities and challenges the organisation faces; *'I feel it's something that we own rather than something that's been done to us, so I think it's sustainable.'*

Bobath

Bobath Scotland is a registered charity and company limited by guarantee, which has been established since 1994. Based at their therapy centre in Glasgow, the organisation takes a holistic approach to providing specialist therapy and support to children and adults with cerebral palsy and their families. It is a small organisation of fifteen staff, of which seven are therapists working directly with children and adults. An ambition for *Better by Design* was that more people throughout Scotland with Cerebral Palsy would be able to access their services in a sustainable way. Bobath say that they are in a better place as an organisation than they were two years

ago, but don't necessarily attribute that to their experience of the designed process. They have particularly valued the 'safe space' that the process has provided and the Investing in Ideas monies that freed up staff take to take part. Research undertaken early in the process provided independent validation from the people that do use their services about what they valued and that has been important in helping them rethink how they demonstrate their impact. This confidence that their service is valued adds to the sense of disappointment and lost opportunity that the experience did not provide greater insight into why more people don't use their services and how they could break down any barriers through new service design.

CARF

Citizens Advice and Rights Fife Limited, known as CARF, is the Citizens Advice Bureau for Fife. CARF offers free, confidential, independent, impartial advice to clients from across the area. The organisation was seeking to be more robust, more fit for purpose and sustainable. They wanted to become more responsive, proactive and have the tools to deal with the inevitable changes and challenges of the environment in which they work.

Better by Design has been an engaging and positive experience for CARF which has given them a chance to pay attention to parts of their business that needed it. There's a new sense of sense of organisational coherence and recognition of the way that the organisation works as a whole rather than as segmented parts or services. There's a much greater level of engagement and openness to new ideas within the organisation. This has forged new working relationships and sense of untapped capacity and skills that can be developed, in turn developing an eager and shared sense of the ways in which they want to move forward together.

An important element of their work has been looking at how they attract and manage volunteers and are prototyping a 'Triage Pilot' to use volunteers in new roles. Whilst they don't think they have achieved all the outcomes they originally hoped for from *Better by Design*, they suggest that the building blocks are in place. There is a desire within the organisation to make those changes that might previously have felt like a management imposition, a realisation that it's going to take time to do properly and a new sense that the kind of changes they wish to see are possible as they have the capacities and tools to make them happen.

Diabetes Scotland

Diabetes Scotland is part of a UK wide charity, which cares for, connects with and campaigns on behalf of every person affected by or at risk of diabetes. They applied to *Better by Design* to provide external input to a process of re-design that they had started themselves. Specifically they wanted to be more strategic and long term in their thinking and planning; to

really involve people using services in the design of those services and to develop the skills of their team, particularly in leadership and management.

Although they haven't achieved all the outcomes they hoped for, they are well on the road and say '*we are bigger, more resourced and smarter. We know where we are not doing well, for certain.*' The *Better by Design* process has given them confidence that they are right to focus on outcomes for individuals and really listen to the voice of those using services. It has also given them more credibility within the wider organisation. The National Director says '*this year our planning was recognised as the best and strongest in the organisation because of the clarity we have gained through Better by Design*'.

The last year has been a time of growth and of re-structuring for the organisation, which has been hard. Through the *Better by Design* process they have been able to reconnect with purpose and learned some harsh but useful truths.

The Investing in Ideas funding has enabled the organisation to fund an Engaging Communities Officer to continue the work of putting people at the heart of designing their services.

Healthy n' Happy

Healthy n' Happy Community Development Trust is a registered charity and limited company established since 2002. Based in Cambuslang and Rutherglen the organisation supports the health and well being of people living and working in the local area through a diverse range of services. They have a strong reputation as an innovative organisation and were interested in using the design-led process to make better use of feedback as a driver of organisational learning, to enhance organisational effectiveness and create greater financial sustainability by building a model of new ventures.

Healthy n' Happy have most valued the elements of *Better by Design* that supported them to look at their engagement and participation work and impact and evaluation framework, which has been influential and practical. Otherwise, they suggest they have put in a lot of time to the process, without the kind of results they would have expected. They felt the process was not bespoke enough and that there wasn't the flexibility within the resourcing of the programme delivery to pursue other options that might have fitted their needs better; they would have liked a chance to 'design the design-led process'. Despite this, they are positive about the potential of design-led methodologies as creative and visionary stakeholder engagement processes. They value the offer of ways to harness existing skills and creativity, the novelty of allowing for 'failure' and the strong fit with their own ethos and assets-focused approach. In a sense, the experience has

given them a new way of thinking about what they do already through their own adaptive approach to learning and change.

Impact Arts

Impact Arts is a charity and social enterprise based in Glasgow but working across Scotland. Their mission is to change lives through the arts and their objectives are to work with young people to help them increase their future life prospects and prevent homelessness, and older people to prevent isolation and loneliness and encourage social inclusion. They employ more than 50 staff and over 200 freelance artists. This year hasn't been an easy one for the organisation and it is has faced staff changes and funding cuts: *'It has been a particularly challenging time - maybe we wouldn't have got through it without some of the input from Better by Design?'*

Through the programme they have spent time with the board and staff team re-crafting their mission and long term funding strategy. Although they are accustomed to planning and developing new ideas, being forced to slow and down and take structured time to do it has very helpful. They have moved from a place where their priority was responding to the employability demands of funders to one in which they have a strategy and business plan which puts creativity at the core and is already fully funded for the next financial year. Several new funding streams have been developed and are being prototyped but it is too early to say yet whether they will be successful.

Being an arts organisation, Impact Arts was familiar with design thinking and found the design led approach easy both to adopt and adapt. Elements of the process challenged them to think differently. They particularly benefited from developing a theory of change, using the Three Horizons process and prototyping new social enterprise ideas. The Chief Executive also appreciated the 1:1 support she was able to access through the programme.

They have found the input on impact and engagement less useful as it didn't feel relevant or timely. The research with participants from their programmes, however, was helpful in putting together funding applications. The Investing in Ideas grants have already proved useful in employing a fundraiser and sorting out the database.

The Chief Executive has taken part in several of the learning events and the CEO meetings and the organisation is in the process of following up ideas with and leads from other organisations involved in the programme.

LAMH

LAMH Recycle Ltd is a registered charity and company limited by guarantee based in Motherwell. As a social enterprise, LAMH provides training and employment opportunities within a supportive work environment for individuals who are long-term unemployed.

LAMH were seeking to use *Better by Design* to enhance their financial sustainability and to create more efficient and effective organisational systems. In particular, they wanted to enable staff to make a greater contribution to the direction of the organisation and create a climate where greater delegation of everyday operational work can take place.

LAMH describe a very positive and energising experience of the programme, that has made them do something they knew they needed to do, but might not have done without the formality of the programme. They have managed the process at the same time as significant diversification and growth in the business.

They felt that the delivery partners got to know the organisation well, listened to them and worked with them to provide different kinds of bespoke support. This has included coaching with the senior managers and case studies of the wider social impact of employment that 'really got under the skin of the organisation'. The process has also enabled some robust conversations to take place; the external facilitation has helped to make such conversations feel safe and helped people to challenge ways of thinking and patterns of behaviour for themselves and others. A small change team has been a significant development in itself and the members have valued the better communication and honesty that the process has brought. In this, they flag up a downside of the process that there is a need to bring in other staff into the process much sooner so that they don't resent not being involved. There's a sense that slowly, culture change is happening as people are beginning to understand other people in the organisation and how their work affects each other.

LinkLiving

LinkLiving Ltd. is a registered charity and limited company established in 2001 in Edinburgh. It operates as part of the wider Link group, a large provider of housing and support services in Scotland. LinkLiving's care and support services currently work with people experiencing a wide range of social needs, including young people leaving care, homeless people and people experiencing mental health issues. LinkLiving describes a positive experience of *Better by Design* in the context of some very difficult challenges for the organisation, including a Care Inspection and the appointment of a new Director. The organisation needed to adapt to the move away from core funding and to align its business processes with Self

Directed Support funding.

Whilst it felt like a difficult time to be embarking on an unknown change process, in hindsight, LinkLiving says that the programme did come at a good time and that it is now in a much better place. The process has opened up conversations and created the organisational space to pause and reflect; *'that's made us more resilient, but we wouldn't have done that without Better by Design - the day job would have got in the way. It's not easy for us to close shop and spend time together.'*

LinkLiving has worked through a Change Team that has involved about 18-20 members including service users and people from the Board, senior managers, service managers, support staff and volunteers. Staff and service user engagement have both been important elements of *Better by Design* and LinkLiving also used Investing in Ideas to fund the development of service user involvement, which includes a joint conference where staff and service users will be working together on a strategic plan.

SCARF

SCARF (Save Cash and Reduce Fuel), based in Aberdeen, is a social enterprise that delivers services to alleviate fuel poverty and develop sustainable living across Scotland. SCARF was interested in using the design-led process to explore ways to increase its social impact and develop sustainable business models. SCARF are an organisation that feels that they know their marketplace and customers well and have found that the design-led process has reaffirmed their stance of putting the customer at the heart of everything they do.

SCARF used the process to support and enable constructive and collaborative change management process that has become *'simply what we do now'*. They are enthusiastic about the process, both as a way of empowering staff to *'think for themselves rather than seek approval'* and to formalise and clarify their thinking around the customer journey and focused on designing *'with'* the customer. One simple change involved the installation of a large blackboard in the corridor to encourage staff to share and vote on ideas for improvement.

Their CEO Billy Sloan identified the importance of a *'critical friend'* or *'someone who we know is supportive but who is going to say what are you doing? What have you done about that? How are you taking that forward?'*⁷

Billy Sloan was an important critical friend to the *Better by Design* programme as a whole. He chaired the meetings of the Chief Executives and always stressed the importance of flexibility to allow organisation to learn

⁷ Sadly Billy Sloan passed away in January 2015. These quotes are taken from a case study featured in *Valuing Design - Mapping design impact and value in six public & 3rd sector projects*, Joyce Yee, Hazel White and Lindsey Lennon, AHRC, Northumbria University, University of Dundee, 2015

and grow as they go. In this respect, SCARFs ‘research journey’ has been instructive. Like many other organisations, SCARF was pleased to have an opportunity for research to be carried out on their behalf, but wanted research to be a chance to enable staff to learn some new skills and saw their active engagement in research as a way to get the knowledge generated from the communities they work with into the heart of their business. In making this critique, they played an important contribution to the developing thinking and practice of the *Better by Design* programme.

Scottish Refugee Council

Scottish Refugee Council works across Scotland to: increase public understanding of refugees; advocate for fair and just legislation and policies, support refugees’ integration and ensure refugee voices are heeded and ensure refugees have access to quality advice services, information and support.

With a staff of almost 50 and a volunteer base of around 60, it was one of the larger organisations in the *Better By Design* cohort. It hoped to use the *Better by Design* process to involve the whole organisation in planning strategic and sustainable change in line with the changing needs of service users. It proved a challenging task in a year in which included changing contracts and a substantial cut in funding. Nonetheless Scottish Refugee Council was able to make good use of the programme at particular points. Two members of the senior management team became passionate advocates of the design led approach and used it successfully to re-design particular services, such as the Family Keywork Service or inform their implementation e.g. the Holistic Integration Service and to develop new relationships with partners and service users ‘ *we were emboldened to do things differently*’.

Support from the programme led to a new emphasis on fundraising in the organisation and a much greater awareness of how to take a bottom-up approach and really listen to the voice of refugees and wider communities of benefit. Their changing needs, combined with the cut in funding meant that some services had to be re-designed. *Better By Design* assisted Scottish Refugee Council to realise further their goal of sustainable outcomes rather than projects. Using design-led tools and processes supported a more creative dynamic in a range of meetings from the senior management team monthly meeting to the Service User Involvement Group, and a more integrated approach within the organisation.

The Investing in Ideas fund enabled the organisation to improve their information systems - a key goal at the outset - and embark upon on new work on public attitudes. New alliances have been formed with other organisations in the cohort which is informing integration outcomes for example, housing and homelessness.

Investing time in the programme, and gaining support for a new approach,

remained a challenge throughout. For Scottish Refugee Council it coincided with major changes to the organisation which limited its potential and it ended too soon. To date there has been no opportunity to follow up several of the ideas generated due to lack of capacity, but the support has helped them through this critical stage and provided assistance as they approach their 30th anniversary, from rebranding to identifying opportunities for celebration and new work. A legacy remains, a range of tools people are confident in using, enthused and empowered staff, recognition and value of their creativity and anchoring people at the heart of their work.

Simon Community Scotland

Simon Community Scotland is a registered charity and a limited company initially established in Glasgow in 1966. The organisation delivers services with and for people experiencing homelessness. Service delivery includes prevention of rough sleeping, intensive outreach, emergency access, supported accommodation and life skills development groups.

Their initial goals for *Better by Design* were concerned with making the voices and experiences of the people they work with the heart of everything they do, shifting towards prevention of homelessness and being able to show how their work impacts on individuals and communities. Early on in the process, they realised that they also needed to ensure that staff felt really connected to the organisation and confident in their practice. This was an essential part of their overall ambition; they felt that a sole focus on the people that use the services would not work.

They found the design-led process to be a very different way of thinking, doing and being. At times it was uncomfortable and it took some time for people to 'get their heads around it'. Looking at the service user journey was an important moment of insight for many of the team. It helped people see why they were doing things, to see how they'd focused on deficits, risks and vulnerabilities and overlooked the wider picture of strengths and potential. Importantly, it validated their role and gave them knowledge and greater confidence. This seems to have really breathed new life into the staff group who say that it's helped them to stop thinking about coming up with solutions all the time. There's a new hopeful and positive sense in the organisation and shared confidence that the process started by *Better by Design* still has plenty of momentum. They stress that '*the learning really came together when the service user handbook development came into play for the Change Team - it was the power of having both a tangible goal and a product to work towards.*' The new Service User Handbook ("The Box") is a tangible result arising from this new ways of thinking and working.

PLUS

PLUS is a charity which was set up by families of disabled children in Forth Valley in 1988. It aims to give children and young people the support they need to get out and have fun with people of their own age and enjoy time away from their families. It has a small core team but works with over 250 families across the area.

PLUS feel that there were always good at involving young people and their families but they have now taken their practice to a new level. Through *Better by Design* they have supported young people to design new services for themselves. These have been funded through Investing in Ideas money. A separate Investing in Communities Funding Application was developed using a design-led approach and has featured central involvement from those who will be using the support. Young people who use their services are feeling more valued because they recognise that they have the ability to direct the support they receive.

Better by Design has also supported them to develop stronger relationships with the local authority. The Integrated Children's Services Plan 2015-2018, features two references to PLUS highlighting the impact of their services through research carried out during the programme. The local authority inspectors nominated PLUS as an example of good practice; this confirms to the CEO that *'we are in the right place and are now talking some of their language.'*

Through their experience of working with the *Better by Design* team, and in particular attending the Academy, PLUS have integrated design-led approaches into the way they work: *'it's become a natural process for us... we have the confidence to do things we couldn't do previously.'*

Tullochan

Tullochan supports around 500 disadvantaged young people in West Dunbartonshire a year, to make positive choices in their lives. They outlined seven key objectives in their application for *Better by Design* ranging from support with developing a long term strategy, to developing new services which really involve young people, to getting new partners on board and gaining new statutory funding.

They have achieved many of the outcomes that they originally identified but put very little of that down to the impact of *Better by Design*: one of the Change Team members suggests that *'everything we have achieved we have achieved under our own steam'*. What has worked well to *'set us off in the right direction'* was establishing a Change Team early on, which involved senior management and workers from across the organisation.

In the last year, they have designed a new programme for young people in S5

and S6, have piloted it in schools and have been paid by two schools to deliver it. This is the first time that they have been successful in persuading schools to buy their services.

Tullochan are disappointed in the *Better by Design* process and it didn't deliver what they wanted: '*I don't think [the delivery team] ever fully had a handle on us as an organisation*'. They have received support from the Investing in Ideas programme and used the money to contract with another consultant to develop a strategic plan for the organisation and undertake a feasibility study.

VAER

Voluntary Action East Renfrewshire, based in Barrhead, was set up in July 1998. VAER's role is to provide a single structure for volunteer involvement and development, community capacity-building and enterprising supports for the third sector. As a local Community Planning Partner they also champion the role of the third sector in building successful communities.

Given this role, they sought to use the *Better by Design* process to facilitate collaboration across networks and sectors and to redesign how older people get home from hospital. The current partners comprise a range of national and local organisations including: the British Red Cross; Scottish Care; East Renfrewshire Carers' Project and Community Transport; local volunteers; churches; a befriending service; older people with experience of delayed discharge; NHS nurses; East Renfrewshire Council; the Community Health Care Partnership Senior Social Worker; and the Royal Alexandria Hospital (Paisley).

The Home from Hospital initiative aims to examine ways of improving community capacity and resilience through better use of community assets; developing opportunities to work with national and local public service providers in order to improve older people's experience of coming home from hospital and prevent readmission; and to develop leaders 'who think in possibilities'.

For VAER and their partners, *Better by Design* has been transformational. It has facilitated the exploration of collective impact as a way of doing business. Creating a common agenda and joint approach to problem solving has enabled the development of trusting relationships, shared understanding and co-designed outcomes. Some took to the different tools and approach straightaway; others took a bit more time to warm to them: not using the models they have was one of the big challenges.

Their CEO says that, "*As an organisation VAER has benefited hugely from support at a leadership level to change how we work as an organisation. The tools and processes introduced to the organisation have offered practical steps to help release our inherent creativity and optimism across the staff team. The design approach also provided the opportunity for all participants to experience the real potential of collaboratively designed systems and processes, working with people from all walks of life to their strengths; people that use medical services, volunteers, community groups and public sector staff to think in possibilities. As the Better by Design initiative comes to a close, the work is entering a new phase, evolving and growing as new partners actively join 'East Ren Collaborates'.*"

Women onto Work

Women onto Work is a small charity based in Edinburgh, but working across Scotland, which helps women who experience barriers to work, prepare for, and move into jobs that are rewarding and sustainable. They work with women who are on the margins of society, who suffer both from financial and social exclusion.

The organisation has experienced a huge amount of change of the last 18 months and could be said to have gone through a time of crisis. *Better by Design* has accompanied it through this process, with varying degrees of success.

The new Chief Executive feels the process had more of a positive impact than staff, who were part of it, may be able to acknowledge. They identify frustrations with plans, which didn't come to fruition, delays and difficulties in getting hold of delivery partners and being put off by the jargon. Much of the work done was either incomplete or lost as a result of staff changes. However, the Chief Executive has found the process useful. Conversations with Taylor Haig were very helpful in getting her up to speed in her new role.

The organisation has now moved from a position of defining themselves in relation to the requirements of funders, to a position where they are far clearer about which specific women they can support and in what ways: *'it did make us look at ourselves and made us look at what we are delivering. It gave us the momentum to look at our referrals and make sure we are getting to the right people. I am pretty sure that our clarity of purpose and focus came from the Better by Design process.'*

Women onto Work are now able to measure their impact more effectively having adapted their evaluation systems with support from the Young Foundation. The Investing in Ideas grant is also helping the organisation develop the robust financial systems it needs.

- 2.3 It is clear that the experiences of the organisations were very different, although there were some common themes. All the organisations have continued to experience constant change and challenge from the environment in which they work. This has been experienced as both welcome and positive and demanding and difficult, depending on the organisation. Changes include management and staff turnover, Board reorganisations, funding gains and losses, new contracts and legislative and policy interventions.
- 2.4 The outcomes they achieved individually and collectively through the process are explored in the next chapter. What worked in particular, and what didn't work forms the subject of Chapter 4.

3 Chapter 3 Progress towards outcomes for the organisations

3.1 In analysing progress towards outcomes we have identified the two referred to in the first *Better by Design* Annual Report as our benchmark:

- *Being more sustainable in the longer term by being through a process of change*
- *Meeting the needs of their beneficiaries better now and in the future,*

3.2 The organisations identified their own outcomes, both in their applications to the programme, and in their meeting with the Learning Partner, but they all fall within the same territory.

3.3 Overall the organisations felt that they had made progress towards their outcomes. Twelve out of the fifteen (or four-fifths) of the organisations credited much of their progress to being part of the *Better by Design* programme, three felt like it was due solely or in a large part, to their own efforts.

3.4 This question of attribution of change to any programme such as *Better by Design* is difficult. In coming to some conclusions about progress towards outcomes, this section relies on the attributions made by the participants in the programme, in particular, those people most closely involved through membership of a Change Team or other grouping. In this way, and by thinking about contribution rather than clear-cut attribution, this report draws conclusions grounded in the experience of the organisations themselves.

3.5 Context is also an important influence on outcomes and Chapter 2 gives a flavour of the continuing challenges the programme participants have faced.

3.6 The two key outcomes for the programme have a symbiotic relationship and it can be difficult to separate out the different elements of the process that may have contributed to outcomes. Meeting the needs of beneficiaries better, both requires a process of change and will, it is hoped, lead to organisations being more sustainable in the long term. The link between new approaches to service design and sustainability was well made by member of a Change Team:

“This hasn’t been about ‘money first’ in the sense of being primarily about getting the money in and new income sources, but it’s been amazing because the money has come without it being ‘money first’.”

More sustainable in the longer term by being through a process of change

3.7 Organisations tended to talk of having planted the seeds, or being further along on the journey, rather than suggesting that they had reached their original goals and or say with confidence that they now felt more sustainable. In acknowledging this work as both complex and ‘unfinished’ they did identify some useful signs of progress. These are:

- Greater engagement with and by staff
- A more proactive than reactive stance
- Adopting new and different models of services that improve service delivery
- Stronger partnerships and shared responsibilities
- Changes to funding opportunities
- Better able to learn, change in response to new challenges and develop resilience.

Greater engagement with and by staff

3.8 Several organisations were deliberately seeking to create new internal cultures where staff felt more confident and empowered to take initiative and responsibility and built this into their desired outcomes from the programme. In others, the realisation of the importance of staff engagement came about as the programme started to develop; in one organisation, a discussion of the outcomes that had been included in their application highlighted the interconnectedness of service user and staff engagement:

“We had a whole range of things we wanted to do - a big part of it was giving life to the staff group. We realised that to achieve some of the other outcomes we need to include both the staff and the service users in this process. Those outcomes 1 & 2 are essential - and they go together. If you just go with the service users you marginalise the staff.”

3.9 In other organisations, the unanticipated level of staff engagement proved to be useful for developing new leaders and succession planning.

3.10 In around half of the cohort of organisations, staff members are more fully engaged in their organisations as a result of *Better by Design*. Those staff members who have been part of a Change Team say that they now feel more involved in setting the purpose and direction of the organisation and report that in general terms, the process has created a greater sense of internal connection across functions and teams. This helps to develop a stronger awareness of the impact the organisation has on people’s lives and how each of their separate roles contribute to that impact.

3.11 This is also true where external partners have also been involved in the process. In one particular case, staff from the statutory sector, have been engaged at a senior level through the *Better by Design* process and new partners from across sectors, have come on board. It has improved the

standing of the voluntary organisation in the eyes of partners. The development of trust between partners has led to the formation of strong, cross-sector partnership with a sense of collective impact.

- 3.12 Establishing 'Change Teams' in some organisations has been an important way to engage with staff as part of the *Better by Design* approach. The CARF case study looks more closely at how the Change Team is making a difference to the way things are done and how this starts to bring about culture change.

How the Change Team works at CARF

The CARF Change Team is a small group of between 8-12 people with a clear and practical brief to work out how to make the new service ideas really work. The Change Team brings together people who might not normally work together - and who might not even have really known what each other did beforehand. The team themselves say that it's a stark and welcome contrast to their previous ways of working in the organisation. The original core change team was chosen by the CEO and a Board member, but since then the membership has grown in response to the emerging needs and interests in the work.

At a meeting in November 2014, the Change Team discussed the prototyping of their 'Triage Pilot' to use volunteers in new roles. At the end, the members shared their thoughts about what makes this way of working so positive for them.

The approach seems to work on a number of levels. They say that meetings are smaller; *'In the past we'd have a big meeting - but you'd get stuck, everybody would want their pennyworth.'* The meetings are more focused and practical, with much of the work going on between times, with the meeting itself used to check in and consult back. The views of the wider organisation and those of clients have been fed into the process through surveys, consultations and other forms of feedback.

This more focused and specific approach seems to have made tasks more workable and opened up new possibilities: *'otherwise the task seems to be too big - a mammoth! - that might not be workable, and so doesn't get explored.'* So smaller meetings also enable the team to explore issues more deeply and feel more accountable for their different roles. The team say that this helps to *'tie up the loose ends of complicated services with their different strands'*.

Importantly, the people involved in these discussions are the ones who are actually implementing the prototyping exercise. They each bring their knowledge of the personal and professional differences in approach to advice work practices and operations. This means that the discussions are rooted in a real appreciation of how the service actually operates at their different sites and they are able to express their hopes and fears about whether any changes will be an improvement. After a good discussion about roles, skills, providing cover and possible unintended consequences of the new approach, they

decided to change the proposed name of the service.

The work of the Change Team was initiated by *Better by Design* and facilitated by a new approach and set of tools. It has enhanced trust amongst the staff and provided them with confidence in a shared goal: *'it's has made me confident that we're all wanting what's best for clients and the organisation - we have a shared goal. This is reinforced in the effort and time people put in- the passion is there and the willingness. People that weren't part of it initially were hearing about it and saying 'I'd really like to come along to that!'*

It's clear that the process has built up momentum; *'The mood is better - there's more 'oomph'! People are offering to do things. There's more discussions outwith meetings, more transparency. It's not all about what management are up to! Better by Design has given us the freedom to speak freely - not to be shot down in flames. Now nothing is dismissed. There is some long-standing 'here we go again' type attitudes. But people are seeing that the changes are taking effect - it gives people confidence in the process, to watch this space. It's cultural change.'*

A remaining challenge in an organisation with over sixty staff and 100 volunteers is to communicate the ideas for services themselves, but just as importantly, how they have been developed in this new collaborative and engaging way.

- 3.13 The *Better by Design* delivery partners have always stressed that what they are looking for is a change of mind-set within organisations, not just an ability to use the tools and processes. Several members of the Change Teams commented on how they now think differently: *'I think it's completely changed the mind-set that people go through their daily working lives with.'* This has generally been a good indicator of transformation which bodes well for sustaining the approach.
- 3.14 In some other organisations, the impact of *Better by Design* on the people working in the organisation has been more confined to the Senior Management Team and, sometimes, the Board. In one organisation, two senior managers were frustrated at their lack of success in changing the mindset of their colleagues, and in three organisations it is not credited with having had an impact at all.

More proactive than reactive stance

- 3.15 Using a design-led approach to develop strategy undoubtedly left some organisations feeling stronger and more confident in expressing their ideas about what was needed to the wider world. This is significant for a sector in which organisations can feel that they lurch from one crisis to the next. Several of the organisations talked about having been through a difficult year.

- 3.16 The Impact Arts Case study illustrates the value for the organisation of using the programme to reassert the purpose of the organisation in a climate where priorities can become skewed to fit funders' agendas.

Impact Arts: Reasserting Our Purpose

Better by Design has provided a space for Impact Arts to stand back and consider how to re-think its approach to business development. Like many other voluntary sector organisations, Impact Arts has been frustrated by the constraints of short term funding, and what had begun to feel like a rather 'hand to mouth' existence.

The design led process undertaken with the Chief Executive and the Board of Impact Arts meant developing first a strategy then a new and more sustainable business model.

The first few meetings focused on re-stating the mission and purpose of the organisation. The Chief Executive realised that the organisation had become more focused on the employability outcomes expected by funders and partners, than on their original purpose: '*we are an arts organisation and what does that mean?*' The debate centred on how to hold the tension between maintaining their creative intent, and still making enough of an impact.

Using a Theory of Change process the Board developed a new mission statement '*to help people change their lives through creativity and the arts*' and both long term and short term outcomes which are captured in the new Strategic Plan.

On that basis the Chief Executive was able to put together a bid to Creative Scotland, which included a new business plan. Using the Creative Scotland model for developing a business plan enabled them to put arts back in the centre whilst at the same time maintaining their focus on creating jobs in the creative industries. The CEO now feels confident that they have clear and measurable outcomes developed internally for the organisation rather than in response to funding bids.

Impact Arts were supported by *Better by Design* to work through the Double Diamond Design process on a number of projects: developing insights, gathering inspiration from those who use their services and partners, innovating through developing prototype projects and implementing these projects.

They used frameworks such as the Business Model Canvas to generate new business initiatives which range from: the Young Gallery, a dedicated and aspirational space where children and young people are able to celebrate their artistic achievements, set up as part of the Commonwealth Games Legacy in 2014; to income generating Vintage Costume Workshops, a 10 week course currently being delivered in Edinburgh to winning Climate Challenge Funding to create new and beautiful ways to grow food in a community garden. They used the retail experience within the *Better by Design* to come up with a new brand

for their shop Factory 45 which now stocks only new young designers.

Better by Design enabled them to spend time together as a Board and a Senior Management Team really getting to the heart of what Impact Arts is about as an organisation. At the same time the CEO received some valued one-to-one support .

- 3.17 Sometimes the *Better by Design* process was able to support organisations through difficult times; but at other times it wasn't.
- 3.18 One CEO appreciated the coaching support she received as part of the process, which enabled her to hear staff concerns differently. However her colleague, a senior manager, felt at times that involving staff through a design-led approach led to: *'opening up cans of worms I couldn't manage'*.
- 3.19 Having a proactive stance was not always possible, particularly when commissioners set deadlines for funding applications which didn't allow time for either staff or service user involvement.
- 3.20 *Better by Design* did help most of the organisations come to a place where they felt confident in themselves and their mission, but not all of them:
- "We have an overwhelming sense of disappointment - we have been let down on this outcome. We were very clear that our organisation had grown rapidly and that we needed to change."*
- 3.21 The delivery partners articulated the change they saw in organisations as: *"an ability to be more 'heads up' in a sector where everyone is normally 'head down'."* They saw organisations as more 'ambitious' and 'hopeful' at the end of the programme than they had been at the beginning. They saw staff being more courageous, having more 'authentic conversations' with one another and admitting to not knowing the answers.

Adopting new and different models of services that improve service delivery

- 3.22 *Better by Design* was not based on the delivery of a single explicit approach to design. It offered organisations some flexibility in terms of whether they should be trialling service design that would support them to design new services or strategic design that would use a design-led approach to their whole organisation and be explicitly linked to core business planning.
- 3.23 In practice, these approaches were not necessarily mutually exclusive; most organisations focused on the latter rather than the former, and twelve out of the fifteen could highlight emerging new ways to develop services and for some, different models of service provision. Using the service user journey and the prototyping process were seen as important elements of developing and testing new ideas.
- 3.24 The Simon Community Scotland case study below illustrates how previous ways of working had unintentionally excluded some people. There are other examples of a similar nature, where a lack of attention to process had been

based on untested assumptions about people and may have inadvertently been stigmatising.

Out of the box: Simon Community Scotland

As part of an organisation wide review of documentation, the Simon Community had a group looking at producing a service user guide to the organisation. To be fair and equitable, this was expected to be much the same as a guide for staff: *“People were expecting it to be an A4 booklet with lots of information and a 6 page document on complaints!”*

The *Better by Design* process has made a big difference to the way this has turned out. The Change Team member, involved in developing the new guide, started to ask lots of questions that opened up the conversation about whether it really had to be done that way. One of the service managers puts it like this: *“It became obvious to us that it wasn’t clear why anyone coming into our service would want to keep it. It would tick all the boxes with commissioners and the Care Inspectorate but it wouldn’t be used.”*

The new guide is now being prototyped. It’s a box, about A5 size that contains a collection of information and useful things that fits easily into a back pack or bag. It contains essential information, say about fire procedures as well as clear information about what you can expect from the service. There’s also more local information about the specific service and a map of the local area. There’s a pen that also a torch, a diary, notebook and wall planner. And as you might expect, there’s also information about key policies, including confidentiality and complaints procedures. Some stories from people who used the service in the past are also included to get across the true ‘flavour of the service’. What’s more it now comes into two sizes, so that people who are rough sleeping can have a more compact version.

The staff are excited about this new approach. It’s so much more than a box. One of the team that developed it called it a ‘boundary object’: an object, in design language, created to help communicate ideas across different social groups or communities. The support staff will use it as an engagement tool with the people in their services. They say *“it will be a topic of conversation - and will prompt more questions. That will help us get to know people and build relationships with them.”* It’s also more flexible because not everyone will need everything that’s in there: *“if someone’s only with us for one night, we might just point them to the fire safety information. If they’re in the outreach service, they might just take the diary and pen”*. This flexibility also means that it will be much easier to add things to it as the ideas develop and they learn more about what people find most useful.

Reflecting on the learning, one of the service managers says *“we tend to create things that we think are suitable for service users. But it wasn’t - we were excluding a lot of people.”*

- 3.25 There are also examples of greater service user involvement in other aspects of organisational practice, including involving them in recruitment of new posts.
- 3.26 Design-led approaches are now being used to: put together funding applications; develop ideas for fund-raising activities and prototype new social enterprises and service models, for example, with volunteers:

“In time we think it is going to lead to a better recruitment level for volunteers...if we can attract more volunteers we’ve got more diversity and roles available to them that means we can deliver the service in a different way.”

- 3.27 For some organisations this has meant cutting services as well as creating new ones. Taking a design-led approach to one of the services they offer, one organisation realised that it was valued and needed by only a very small number of people and felt that ultimately it was not cost-effective: *‘four years ago I would have gone out and got more funding for it’*. Now the Chief Executive has decided to cut it: *‘if you do service design really well you get brilliant outcomes but it makes for hard choices’*.
- 3.28 At this early stage of implementation, it is too soon to see how these new approaches and models might improve service delivery for beneficiaries, but the organisations are convinced that they will. The organisations are hopeful that they will flourish and signal an end to their dependence on restrictive funding arrangements. Many feel that there is no going back to their former ways of working.

Stronger partnerships and shared responsibilities

- 3.29 For several organisations coming into the *Better by Design* programme, developing stronger partnerships with, in particular, the statutory sector was an explicit aspiration which they saw as crucial to their survival. Where this has been a focus, organisations have made important and dramatic improvements that offer valuable lessons for others.
- 3.30 There are examples of new partnerships around both funding and referrals. There is some new recognition by regulators and in local authority policy documents and examples of more robust and equal relationships with commissioning staff. This is not always about a new ‘seat at the table’ but also about a new quality to those relationships:

“It was a fundamental shift in our way of working with and in that partnership. It wasn't just about sharing knowledge of what other people do. It was seeing each other as part of the whole system. It highlights the mutual dependencies, that you can't effect change by pulling one lever.”

- 3.31 This has helped to shift the mindset of key partners and developed a sense of shared responsibility:

“...the biggest change was that the council and CHCP staff weren't the lead. Their staff tend to think that they have to do everything, but here, it's everybody's responsibility.”

- 3.32 This way of working has also provided a challenge to traditional commissioning models because *‘we've collectively designed the specification, almost co-designed the outcomes rather than them being given to us by a commissioner.’*

Better able to learn, change in response to new challenges and develop resilience

- 3.33 The *Better by Design* team were aware that part of their role was to support the 15 organisations to become learning organisations in the long term by being both ‘creative and analytical’. Whilst this goal was not always articulated as one of the desired substantive outcomes, several organisations were explicit about their success in this regard:

“Learning to learn, I think is important. We've said those words before, but I don't know if we've really lived them? So, being a learning organisation. Again, we've said that before, and recognising what to do to grasp that nettle I think that we now have some of the tools that can actually do that and are doing it.”

*“As an organisation, we crisis manage and come up with solutions - and that's the way we think. The *Better by Design* process has helped us to stop thinking about coming up with solutions all the time. Instead, we were thinking, ‘let's see if we can have an overview of how the staff, service users and the organisation core see things, and see if we can come up with more creative ways of involving people and have a more practical level of understanding’.”*

- 3.34 Successful voluntary organisations are by their nature resilient. *Better by Design* has been supporting agencies to be able to develop that resilience by learning from and adapting to new challenges:

- One organisation that has faced a lot of new challenges this year with key staff moving on and funding being cut, has taken the opportunities presented by *Better by Design* to refocus on their underlying mission and purpose and develop a new and creative strategy which the Board have made a big contribution to: *‘we have worked out a way to break even and had structured time to do it. It has been great in terms of strategy. We are on the right road... but not at the end of it - we are closer to getting the long term right.’*
- One Chief Executive speaks of the clarity gained through the *Better by Design* process. This included recognition that the volunteers they were recruiting needed more support than they were able offer; *‘Better by Design enabled me to have the conversation I needed to have with my staff about what the service is for.’* They are now

recruiting people who can support others without needing a lot of help themselves.

- Another organisation suffered a dramatic cut in their funding over the past year; here managers spoke of *Better by Design* as a ‘*life raft... they tried to make the change work for us.*’

3.35 For some organisations, this sense of greater organisational resilience has enhanced their confidence and position in relation to their ultimate financial sustainability. This has several elements which are not necessarily, yet, about access to new funding. Instead it can be about, being ready for a new Service Level Agreement or a quality of awareness, of being more ‘attuned to opportunity’:

“We’re better prepared than we were for meeting some of those challenges, definitely. We’ve got new work ...so we’re not standing still. We’re still evolving...it’s given us something that seems very sellable.....and not just about contracts or responding to commissioners - but being more proactive.”

3.36 This also has an external dimension, for example, where there are signs of a shift in attitude towards the third sector as a route to more resource through releasing community capacity: ‘*senior discharge nurses and carers are now coming to ask us about how the community can help.*’

3.37 This sense of greater third sector credibility is evidenced for one organisation by their inclusion in new integrated service plans. Another organisation suggests that commissioners are more willing to find money for new initiatives: whilst clearly this is ‘work in progress’, stronger partnership working and a greater sense of mutual interdependencies does provide greater confidence that more resources will be forthcoming.

3.38 This sense of greater organisational resilience, is one that is clearly linked to how organisations see that they are able to meet the needs of their beneficiaries:

“I think there’s a strength in the organisation that’s difficult to make tangible but it’s about positivity, confidence, ambition, hope, more excitement and a bit more forward thinking....there’s a wee bit of momentum that I think will continue. Conversations have shifted from contracts and money, uncertainty and all the things that were wrong. Now it’s all about what we do for service users.”

Meeting the needs of the beneficiaries now and in the future

3.39 The design-led approach places great value on including both staff and people who use the service in the design of the service and the connection between staff and service user engagement has been emphasised above. In thinking about their beneficiaries, for most organisations, being able to involve service users more effectively was the single greatest benefit they

derived from the programme. We have identified three indicators in relation to this overall outcome:

- putting people who use services at the heart of them
- focusing on prevention
- understanding and measuring impact

Putting people who use services at the heart of them

3.40 The design-led process gave several organisations an opportunity to step back and look at their purpose from the perspective of those using their service rather than from a funding perspective. Organisations explicitly commented on the fact that they had become very focused on meeting funding requirements rather than on designing services round people: *‘the process gives space to design the service from the perspective of the client - without being influenced by money.’*

3.41 Involving people who use the service in defining their needs and developing ways to address them, naturally leads to a greater clarity of purpose. Many of the organisations acknowledged that they felt that they already understood the needs of the people who use their service, but the *Better by Design* process encouraged them to question that knowledge, and there are several examples where this questioning has overturned previous assumptions: *‘we have a perception internally about what we think the client may want but it may be completely contrary to what they actually think!’*

3.42 A number of organisations have improved their practice on involving people, finding fresh ways ask for feedback and to listen to their service users. The programme not only gave some organisations new ways to involve people, but also enabled organisations to use the information they gathered more effectively:

“We changed one service because of the service user journey process. We recognised that we were labelling people unnecessarily.. So we’re redesigning the programme. We had a failing programme - now it looks like it’s going to be a highly successful programme that other people will want to buy.”

3.43 PLUS has always put young people and their families at the heart of their services, however the case study below shows that they now have new visual techniques for involving people, and new skills in planning, both of which mean that the services they are currently designing are truly co-designed with young people and their families. Consequently the outcomes they are trying to achieve for young people are ones that they have defined themselves.

A big PLUS: Co-design of new services

When PLUS was looking to follow up a project it had run for young people with Asperger's Syndrome, it decided to go about designing it in a different way. Instead of consulting the young people and their families and then developing a project, as they have done in the past, PLUS decided to ask the young people to design it themselves.

The original 'Fixers' project involved two groups of young people with Asperger's Syndrome developing resources which explained their condition and could be used in training. The work of both groups culminated in short DVD's being created. During the process, members of the groups had developed strong relationships with one another and were keen to work together again.

So, PLUS identified seven options, which they thought the young people might want to look at in the future, based on their existing knowledge of them. These were: social enterprise, social networks, peer support, an online community, employability, training to be trainers and training itself: *'it is about finding out from the individuals what they are looking for.'*

PLUS used their learning from *Better by Design* to develop an interactive co-design session for the original 'Fixers' group. During the session, they went through each of the options with each individual member of the group. This process resulted in clear priorities for the young people to work towards in the future, and therefore became the foundations of an application for funding. The areas of most importance to them were: peer support, social networks, training - both delivering and receiving it, employability and social enterprise.

The exercise enabled them to comment on what was important to them: *'people need to know that no-one with autism is the same'; 'family and friends are very important'; 'there are like-minded people here'; 'being with friends here', 'let's me be me.'* They highlighted what they wanted to know more about: *cooking skills - nutritious main courses; money skills; learning a foreign language; interview skills; career advice; getting to job fairs; someone to help me focus; help writing a CV; volunteering opportunities; being a scientist.*

And they came up with their own ideas for action: *create a fact-busting book for Asperger's; franchising DVD and jigsaw made by Fixers; pop up shop; PLUS radio station; PLUS could charge for training delivered by young people; technical training for young people.*

Some of the assumptions PLUS had about what was important to the young people were challenged through the exercise. For instance the online community was less important than they thought. Group members stated that tended only to speak online to people they already knew and trusted, and would often rather meet with people face to face.

The exercise was appreciated by the young people, one participant noted; *'the group has a focus - it doesn't waste time.'*

PLUS used the results of the session to develop an application to the Big Lottery Awards for All programme focusing on a new programme of group work which addressed the five areas identified by the young people. The CEO says that the application ‘almost wrote itself’ on the back of the co-design exercise. The application was successful and the new programme is now being delivered.

Although PLUS has involved people who use their services, and their carers before using methods such as focus groups, this felt different. Prior to being involved in *Better by Design*, they had never co-designed their services and support with the people who were going to use them, taking the lead. PLUS are conscious that it is a new and welcome development for them and one they feel well-resourced to continue in the future.

Focusing on prevention

3.44 Several of the organisations would have defined their services as preventative before they were involved in *Better by Design*. However for a couple there was a real shift in their thinking about how to support people before they got into crisis. One example of a small scale change in this respect involves an educative role with staff who now have a better understanding of the ‘policy language’ around early intervention and prevention:

“...there is a reduction in what we would call crisis work.... This was as much about internal understanding as the work with clients... it was about how staff understood and talked about what they are doing.”

3.45 In general, the focus on prevention expected to develop through *Better by Design* was not yet apparent in tangible ways. However, the progress described here in relation to outcomes is seen as necessary work on which more explicitly preventative strategies can be based: *‘now we dig new foundations rather than fill black holes.’*

Understanding and Measuring Impact

3.46 Several organisations took the opportunity to find out more about the impact they had for beneficiaries, with consequences for how they measure those impacts and talk about their work to beneficiaries and funders. In some cases the delivery partners did the research on impact on behalf of the organisation. In others, they developed new tools and processes for gathering information on impact alongside the organisation.

3.47 One element of this work was a chance to integrate different measurement systems into a collective impact framework that covers different funding requirements. This helps organisations to tell a more coherent story about the impact they make as a whole

3.48 Another element has been the chance to develop a better understanding of the terminology and measurement of outcomes and impact amongst staff. As one of the delivery partners noted: *‘the story of impact is often a task*

given to one person - but it's not something that can be done by one person.' Not only did many of the organisations sharpen their processes on gathering evidence of impact, they also became clearer about how to talk about it:

"I never heard of impact until two years ago, quite frankly. Now it's one of the most important things that I've learned over the past 18 months, We need to make sure that all the stuff that's going back is pertinent and relevant and paints the story of the work that we've got that's going on. It's not simply any more a question of putting numbers down."

"We always knew we did that but we didn't measure it... That has led us to, for example, changing the evaluation forms for all our service users. It's not so much on the numbers and the practical changes but how does it make people feel, so it's really changed my mindset and way of working. And I've got tangible evidence now which I never had before."

- 3.49 In some cases, a more collective sense of contribution to outcomes was developed:

"Better by Design has helped to facilitate the exploration of collective impact, as both a way of doing business and an outcome in itself."

- 3.50 Other organisations also made use of existing 'industry' frameworks for measuring outcomes: *'we needed something a bit quicker than we could have created as part of Better by Design'*. Despite these improvements, some still had some way to go to be in a position where they were really using the feedback they are able to gather to drive the continuous improvement of their services.
- 3.51 The case study of Women Onto Work below demonstrates how they adapted the measurement tools they were using to include a scale which focused on improvements in confidence and wellbeing; data they hadn't been able to collect up to that point.

Women Onto Work: What do we measure and why?⁸

Women Onto Work aims to improve the well-being and employment prospects of women who, by virtue of their mental or emotional vulnerabilities, are furthest from the world of work.

During the course of this work, and in the face of the considerable challenges WOW faces in the rapidly changing environment in which it operates, real progress has been made in clarifying the organisations core mission and designing processes which can enable WOW to tell a robust story about how it achieves this mission.

It all started with an impact and evaluation session in July 2014 which focused on their Theory of Change and identified that whilst it seeks to support women to get closer to the world of work, WOW achieves its impact by working on women's well-being as a precursor and prerequisite to women being able to access employment and training opportunities. WOW does this best when it targets its efforts at the right women (who can most benefit from its range of services), and in the tailoring of its approaches to these women and these specific aims.

This felt like a break-through and it led to the interesting realisation that while Women onto Work measure many things, it does not have any way of measuring its impact in relation to well-being.

Armed with this insight the Young Foundation conducted research into the range of potential well-being measures available and appropriate for WOW's purposes. These were collated and used as the basis for a very fruitful session in September 2014 where the Warwick Edinburgh Mental Well-Being Scale (WEMWBS) was selected as a new measurement tool.⁹ It is robust, measures the right things, and, comprises only 14 questions, so is simple to implement.

The next stage was to introduce the tool into the organisation. Firstly a paper was produced for WOW's technical support detailing the changes necessary for team the management information systems. Secondly, a series of briefing events were delivered to WOW staff, introducing them to the rationale and key features of the tool. These were delivered by the Young Foundation, via Skype - a process which worked well: *'He really 'got' us. Trying to embed his work (on impact) was the priority for us.'*

Now the new impact process is being prototyped. It is too early to say what difference it has made, but the new CEO recognises its value and has worked to ensure that the work is sustained.

3.52 The importance of gathering data on impact also featured in the *Better by Design Academy* where the issue was explored with participants and

⁸ With thanks to Nat Defriend of the Young Foundation for his contribution to the draft of this case study.

⁹ <http://www.healthscotland.com/scotlands-health/population/Measuring-positive-mental-health.aspx>

external input on this topic was much appreciated: ‘we do collect data, but we don’t analyse it ... there is more we could do.’ (Academy participant)¹⁰

Summary

- 3.53 This chapter shows positive signs of progress towards longer term sustainability and the ability to meet the needs of beneficiaries better now and in the future. The organisations are able identify positive signs of progress and the majority credit much of this to being part of the *Better by Design* programme.
- 3.54 This is very much still ‘work in progress’, but there are important signs of change and emerging new models of leadership. Many of these changes are about mindsets rather than radically different models of service provision. They include empowerment of staff, changing attitudes about what is possible, stronger relationships and awareness of interdependencies both internally and with external partners, and new ways to harness insights and experience from staff and service users. This puts organisations on a stronger footing to put people who use services at the heart of them, focus on prevention and understand and measure their impact.

¹⁰ The *Better by Design* Academy was a series of four one-day workshops for programme participants and other invited third sector organisations between December 2014-March 2015 <http://gettingbetterbydesign.com/academy/>

4 Chapter 4 The experience of the design-led approach

What organisations have valued

- 4.1 Most of the organisations have really valued the opportunity to be part of *Better by Design* and think that it has been worthwhile. For some it was strongly motivational and transformative. This was evidenced both by what they said, individually and collectively, and what they did:

“I am fully intent on trying to change the world and persuade people to fund us to change the world....[the final day of the Academy] is the last day of the first day.”

- 4.2 None of the 15 organisations have dropped out of the programme. Although early on several had suggested that they were on the verge of doing so, by the end they were glad they hadn't. When they had the opportunity to disseminate the value of the programme, publicly, they took it. Most have said that they would be prepared to 'do it again', if perhaps differently. For those organisations where the programme has not met expectations or delivered desired outcomes, there is nevertheless, a strong interest in the potential of design-led approaches as collaborative and experiential approaches to organisational change and leadership development.
- 4.3 A wider group of organisations were invited to join the *Better by Design* Learning Academy, which offered an opportunity for them to learn more about the programme from those who had participated. The *Better by Design* organisations who attended the Academy endorsed the value of the design-led approach to the other organisations.
- 4.4 At the same time, Chief Executives and Change Team members have readily identified aspects of the process that they think could have been improved. The following chapter highlights what parts of the process organisations have valued and which parts they found frustrating, before the final chapter of conclusions and recommendations. The first section highlights what they have valued most, the second focuses on elements of the design led approach, the third on delivery and the fourth on areas for improvement.

Values and motivation

- 4.5 One of the great benefits that accrue from a development programme such as *Better by Design* is that it gives participants a chance to lift their heads from the every day and reconnect with the reasons why they came into their work in the first place. We saw evidence of what we might call improvements in morale, in around a third of the organisations:

“It's not just engaged, they're motivated and morale has gone up. Staff morale has gone up hugely. As a result of it all, people feel a certain celebration, don't they?”

“Your values sit as this really powerful core to what you do and sometimes they feel quite far away. I think this process has given them the direct route back into it again and releases the energy that

you can get by listening to folk, by really truly stepping into their shoes and thinking about what we need to do to shift our services to improve and benefit folk more effectively?"

- 4.6 In the rest of the organisations morale was already quite high, or they didn't attribute the change to *Better by Design*.

Reflective safe space and what this offers

- 4.7 The most common theme in relation to benefits, which was mentioned by almost every organisation, was having headspace and time to reflect in a structured and safe way. One participant spoke of the process as '*holding up a mirror*' to them which had given them a sense of perspective and a greater awareness of patterns and themes in their work.

- 4.8 The processes used encouraged people to become aware of and challenge their assumptions and behaviours:

"...it's been rubbing out the self-imposed barriers that you put on yourself. Where you'd think 'that might annoy them or that might...' Instead, it's 'let's just relax a wee bit, let's just do that and see what happens' ... It feels freer."

- 4.9 The design-led approach encouraged people to pause and ask different kinds of questions rather than come up with immediate solutions.

- 4.10 The case study of Bobath explores the importance of what can happen as a result of this creation of safe space.

Bobath: Safe Space for Impact

Bobath's Chief Executive says that one of the most significant things about *Better by Design* was that it gave the organisation a 'safe space' to have conversations about how they demonstrate their impact. It's given them space and time for discussions with staff and people that use the services.

They'd been interested for some time in what it would mean to move from measuring solely medical and clinical outcomes to including social outcomes: *"Better by Design gave us a valuable space to have those conversations with the therapists. How far could we push it, who got worried when? That was important to us."*

Better by Design gave them a chance to really take the time to listen to the people they support. Research conducted early on by the Young Foundation with families that had been to Bobath gave them reassurance that what they do has wider impacts for the everyday lives of individuals, families and carers. For example, it has given children more chance to make choices and decisions for themselves and shown how changing the physical learning environment can enhance a child's ability to engage during lessons. These kinds of valuable benefits weren't being measured.

Bobath acknowledge that the Lottery *Investing in Ideas* money pot of £20k was crucial in enabling them to do the things they've done. This funding made it possible to bring therapists out of therapy sessions, allowing people to set aside time to take part in discussions and help with the research. The funding was important to enabling the Board to feel comfortable about this shift in focus.

As a result, it's helped everyone in the organisation to feel more confident to talk about what they do differently and has changed the way they evaluate their services: *"People are now asked 'how did you feel before you came and how do you feel now? Are you more confident or feel more independent or able to try something new?' Those outcomes which aren't about 'I can walk three steps further'."*

Their Head of Fundraising is particularly pleased: *"the shift to social outcomes has really helped me, because it's what a lot of funders are interested in. It's not so much on the numbers and the practical changes, but how does it make people feel? So it's really changed my mindset and way of working. And I've got tangible evidence there which I never had before."*

- 4.11 The Academy also provided further 'headspace' for participants, who spoke of their intentions to create this space back at work.
- 4.12 One participant in the programme, more familiar with the design-led approach than many others, said *'we would have done it anyway but it meant that we created the time to do it.'* This comment highlights the dilemma faced by many voluntary organisations that often don't have time to think. *Better by Design* required them, with varying degrees of success, to take that time.

Wider internal engagement

- 4.13 The design-led approach often starts with a Change Team and this was the case in around two-thirds of the organisations. Some organisations felt that they were too small to warrant a separate Change Team, but two of those that didn't have a Change Team at the start, later suggested that this would have been useful.
- 4.14 The creation of a Change Team with representatives from different parts of the organisation brought a new energy. This was true even in one organisation that felt like they did much of the work on their own. At its best, the Change Team approach ensures that evidence is gathered from all parts of the organisation; that gifts that everyone has are well used; that changes are not seen as top down, but are championed at every level and that resistance is brought in and worked with, rather than being outside.
- 4.15 For several organisations it worked exceptionally well and they understood the value of it for the future:

"It goes back to the use of untapped resources. There are a lot of people who are on this Change Team who are not part of the

management team ... That's a challenge in itself but it's a challenge that's worth taking on because it spreads this further into the organisation and with people who potentially don't really want to be part of this or resist or obstruct."

"It creates new knowledge really by drawing more people in, encouraging people to look at things afresh."

4.16 One Change Team member commented on how using different kinds of dialogical processes like 'café conversations' had taken staff involvement to a different level. She felt that this way of working really challenged their previous 'it's not my job' culture.

4.17 Three organisations specifically used the design-led process to engage with their Board more directly and others engaged their Board at different times in different ways. This was acknowledged as both useful and important, particularly when they were focusing on strategic or business developments:

"In the past we have reported on things to the Board rather than engaged in discussion about planning things and I think we're trying to get a bit better at that."

"Our Board see it as part of a bigger change process. It's an incremental approach to strategy - not about writing it all down. In the old strategy processes - by the time it's done and written up the world has changed. We need to be able to make it up as we go - within a clear framework of shared values."

Involvement of external partners

4.18 *Better by Design* encouraged organisations to involve their external partners, some of whom were their funders. This worked well in a few organisations; one organisation invited the local authority to be part of their discussion on impact and said that it was: '*particularly helpful to us and also for the Young Foundation because it gave another arm to the discussion on demonstrating impact*'. Another used the approach to facilitate a more creative collaboration with a housing association. A third organisation was able to make a strong impact on their Community Health Care Partnership through their active participation in *Better by Design*. Their joint work is now much stronger and they directly attribute this to *Better by Design*.

4.19 Another organisation felt inhibited about sharing their real issues with their partners and preferred to wait until they had dealt with those before inviting them into the process:

"I think it's more about bringing people on board, but I don't think it would've had the impact on our organisation and our staff had there been other people involved at an earlier stage ... It might've changed things. Now, it feels like we desperately need them to be involved and otherwise we've done all of this work for not very much."

- 4.20 For a few organisations, their original desire to bring others, particularly strategic partners and funders on board, as part of the process, was never realised by the programme.

Design-led Approach

- 4.21 When we asked participating organisations what they thought of the design-led approach in our first interviews, 6 months into the programme, and again at the 12 month stage in the survey, very few of them had much notion of what it was. That has changed dramatically. At the final interviews, many spoke eloquently of both the approach and the tools. This is in part due to their greater familiarity with how the process unfolded in their own organisations and, for those that were able to attend, to the consolidation of that experience in the *Better by Design* Academy.
- 4.22 What they liked on the whole was the framework and logic of the design-led approach. They mentioned the Double Diamond process and the fact that it was possible to move backwards and forwards through it, rather than having to take a linear approach. It made sense at the end of the programme in a way that it didn't at the start or even half-way through.
- 4.23 The *Better by Design* delivery partners have been clear throughout the process that it is the mindset rather than the tools that is important to adopt. For the most part, the organisations agreed with them.

"It's made a difference in my thinking about sustainability of outcomes rather than of systems. Now I ask do we really need it and is this the best way of doing it?"

- 4.24 The organisations appreciated the experiential learning and the challenge to their normal ways of thinking:

"We've all been in the offices but not sat in the room as a customer... That's one of the lessons going forward, probably as new people come in, we ought to send them on a little mystery shopping trip!"

- 4.25 One highlighted how it brought together and added a new dimension to their existing models of practice including person-centredness and appreciative inquiry; *'the design led approach enables positive thinking but it also looks at the problem.'*

Design-led leadership

- 4.26 The design-led process encourages a new quality of leadership to come from all levels. Many of the organisations were quite skilled in this regard from the outset of the programme, although several really noticed a difference. Some Chief Executives mentioned an increase in confidence both in their own leadership and in what they were seeing in their Senior Management Team and Change Team colleagues:

“One surprise that I’ve seen over the last four months is, the actual belief in the Management Team that ...they could change things and perhaps we could develop the organisation. It doesn’t have nearly as many no-go areas, difficult people or difficult attitudes and, for me, that was quite a smiley time...It’s that light bulb moment that everybody started to believe that things would happen, that was really super.”

- 4.27 Another organisation deliberately changed the process they used at Senior Management Team meetings as a result of being part of the programme and has created ways to facilitate more discussion and thinking space.
- 4.28 One Chief Executive spoke of how she wished they could adopt this style all of the time, but because of the requirements of commissioners and tight deadlines, it wasn’t possible. For another the leadership coaching she got through *Better by Design* was transformational, not only for her own confidence as a leader, but also for that of her Deputy.

Tools and Processes

- 4.29 The *Better by Design* approach deliberately introduced new tools and processes, which encouraged people to be creative and to ‘play’. In some cases the tools and language actually put people off at first:

“The one thing on the very first day when we were asked to draw a picture of it made my heart completely sink and quite a few people said “Oh my God, what is this about? I cannot draw a picture of what’s in my head!”

- 4.30 This was particularly true of the tools used at the first learning event, which several people experienced as either patronising or irrelevant. One organisation found the event so off putting that they never attended another. But by the end most loved the visual and engaging nature of the tools. And they understood how they linked to a change in mindset:

“Empathetic design is a really powerful process... if we can get everyone in our services doing it we will be there.”

“(Drawing) was a different way of learning and realising, it’s a different way of making yourself realise.”

- 4.31 Tools and approaches that have made a particular impression include:
- Theory of Change process
 - Organisational Health Scorecard (OHS)
 - The Three Horizons process ¹¹
 - Service User Journey/Storyboards

¹¹ Made popular in Scotland by the International Futures Forum
<http://www.internationalfuturesforum.com/three-horizons>

- Personas
- Prototyping

- 4.32 The principal purpose of the OHS is as a *‘tool for self reflection and to prompt discussion within teams around their organisation’*, a tool for dialogue rather than a measurement tool. Most of the organisations found the OHS assessment to be a useful process: *‘you can see your weaknesses and strengths just at a glance.’*
- 4.33 A couple of organisations highlighted both that they would have liked the OHS to occur earlier in the programme, and to involve all the partners to avoid what could feel like repetitive discussions in other processes.
- 4.34 In general terms, the organisations found the tools and processes easy to adopt and integrate into their own practice. Some staff have felt comfortable enough to adopt a more facilitative style in routine meetings and to adapt the tools for their own purposes.
- 4.35 The Academy introduced the approach and the tools to people who had not had an opportunity to participate in the whole *Better by Design* process. One participant said *‘every time I have left here there have been parts that I have been able to use and take away.’*
- 4.36 Following the Academy, one manager has worked with an external colleague to ‘steward’ a conversation about how their organisations could collaborate. She acknowledges that for some it was quite hard at first, but is a great advocate for this approach:

“I love the design tools! I think it works because it acts as a distraction, something to do with your hands whilst you're talking. Playing makes it both less real and more real. And creating it yourself helps you to remember.”

- 4.37 Others that attended the Academy were less confident and one participant felt that the methodology used was too abstract at times.
- 4.38 Organisations on the programme have appreciated that the approach is not formulaic but supports each organisation to develop their own tools, symbols and processes as well:

“Most of the tools that we have spoken about are those that are visual that have been created by ourselves. ...You can go and you can give me thousands and thousands of post-its and stick them up on the wall and quite frankly I don't think anybody in this room's going to remember half the stuff that was written, where it had come from and why we wrote it. The stuff that we've created ourselves and then visually presented back are the things that just about everybody's remembering.”

- 4.39 The design language used in *Better by Design* has been inspiring for some and a barrier for others. Whilst most organisations might be said to have to have got used to the language of design, some never got past that hurdle and a couple felt either irritated or, in the worst case, patronised.
- 4.40 Others took to it once they had seen it applied: one organisation had a different take on the language and found it helpful because it signalled something different and fresh:

“I think it’s changed our language a bit with how we deal with partners: using some of the design-based language which isn’t the run of the mill jargonit makes people sit up and listen. Sometimes I think that when you work within the voluntary sector, you’re dismissed as not being quite professional. The language around this, I think helps - ‘we need to prototype that!’ - it’s become part of the lexicon.”

Research

- 4.41 A common theme from the initial OHS assessments during the Insight phase was that the organisations seemed to have a strong understanding of the social value of their work, but often didn’t have the capacity or the skills to capture this through research.
- 4.42 A broadly shared issue at the start of the programme was that organisations needed qualitative ways to tell their stories of impact more fully. In this context, many organisations valued the chance to have external, ‘independent’ researchers with the time and skills available to conduct the research. As a result of *Better by Design*, there now are examples of the some of the organisations using research findings to develop their understanding of needs, inform funding bids and write reports to other stakeholders.
- 4.43 The portfolio of research completed encompasses a wide range of research methods including video ethnographies, peer-led research, individual ethnographies, focus groups, informal discussions, service safaris, field visits, surveys, international comparisons, desk research and community asset mapping.¹²
- 4.44 The Healthy n Happy case study illustrates how they used this external support to good effect.

¹² *Better by Design* (2015) Workbook Lynne Wardle (ed) Published by The Big Lottery Fund Scotland

Engaging Research at Healthy n' Happy

Healthy n Happy wanted to ensure that it is successfully engaging a broad section of the community, including those who are not already using or aware of the organisation. It also wanted to find more ways for local people to be involved in the design and review of their services. They felt that this kind of meaningful collaboration with local people would help to ensure that their work is driven forward by the needs of the community. To support these goals, the Young Foundation completed a community-based research and asset mapping exercise in Cambuslang and Rutherglen.

The researchers visited local projects and spoke to volunteers, participants and staff about their experiences of Healthy n Happy and the local area. They used some engaging approaches such as using an analogy of Healthy n Happy as a house and asked staff to say what they brought into that house. They later went out into the wider community and spoke to members of the public on the street as well as in public spaces such as shops, libraries, the health centre, cafés and parks. They asked them about the things that they like and use in the area, if there was anything missing and whether or not they were aware of Healthy n Happy.

Healthy n Happy felt that as they didn't have the capacity or time to do the research themselves, but acknowledge that if this kind of insight gathering is to be sustained, it would need to be built into their routine work. So, the research was undertaken in five days by the Young Foundation team with support from a member of the Taylor Haig team and some Healthy n Happy project workers.

Reflecting on this process, it seems that the findings were familiar to the organisation - but that isn't a criticism - in fact, it is reassuring to know that they are already in touch with the community. They like the methodology and felt that it showed them quite a useful process - which they think they could adopt themselves. It highlighted the importance and potential of 'research' as a form of continuous intelligence gathering and insight to drive the work of the organisation; to be *'the horse, not the cart'*. They're wondering whether *'if the research tells us what we already claim to know, why aren't we making better use of what we already know?'* That's a great question for an organisation that is interested in learning and, like others, risks trying to do *'too many things and not enough of them properly'*.

Healthy n Happy are not new to research and evaluation; for example, they've *'seriously tested LEAP for Health over a number of years'* and know that despite this, they were not really capturing the long-term impact of their work. Through a separate initiative they secured some input from a Scottish Government analyst on a short internship. By integrating that expertise with support from the Young Foundation they are now prototyping a new impact framework that integrates outcomes from different funding streams into a coherent narrative for the organisation. They feel that they have a strong legacy of tools and approaches to measuring impact.

- 4.45 Other organisations wanted to be more involved either to scope the research more fully or to participate in it in order to learn how it's done. The SCARF case study raises interesting questions about scoping research; what research is, who does it and what it is for; how organisations can make better use of the knowledge they already have; using research as an engagement strategy and some practical challenges.

Generating Insights: research in early days at SCARF

SCARF's desire is to use research to develop a deeper understanding of food poverty, what it is, the scale of the problem in Scotland and how it impacts people's lives.

From the outset, it wasn't straightforward to work out exactly what kind of research was really needed at SCARF. They were questioning of the research aspect of *Better by Design* and it took some time to agree the scope of a final research brief. SCARF raised familiar points like; *'What's the point of the research?' 'What is it?' 'What is it for?' 'Why only 5 days?'* And maybe less familiar ones like, *'How can the way that we approach the research be part of our broader concern ensuring that our clients are at the centre of what we do?'*

Eventually it was agreed that, as a first step, the Young Foundation should conduct desk-based research to establish what is known about food poverty in Scotland. They also spent three days on ethnographic research with individuals and families in Aberdeen and Dundee, aiming to develop an understanding of the experiences of individuals living with food poverty and the choices they face.¹³ Their research explored the impact of food poverty on social aspects of people's lives and how their expectations of food have changed.

Like many other organisations, SCARF was pleased to have an opportunity for research to be carried out on their behalf, but it came with reservations; *'it's great to have stuff done for you, but what's the long term impact of that?'* Their aim was that research might be chance to give staff a chance to learn some new skills and get a better understanding about their work. Ideally, they wanted to be involved in the ethnography, but the researchers felt that too many people might jeopardise folk's willingness to talk.

There's no doubt that the research findings are valuable; particularly the insights about the social aspects of food. They showed that food isn't really a social or spontaneous thing (in the way that it is for more affluent people), people shop carefully, and are highly price and 'offer' conscious and they showed just how little it takes to knock people who exist on the breadline, below it.

SCARF have since done their own DIY research to test the findings out for themselves, using some of the tools and techniques from the 'Insight' gathering workshops. They have done secondary research online, staff-wide surveys and 'ethnography' out and about within communities in Aberdeen. This, which they

¹³ Ethnographic research uses a range of methods to explore people's everyday experience.

describe simply as *'standing about and talking to folk'*, has been both insightful and reassuring, not least as the findings reinforced the earlier research that had been undertaken. Whilst they were out and about, they met people who knew SCARF through their fuel poverty work - so it was good to get the feedback that people knew who they were.

SCARF say that using the POEMS and Knowledge Swatches tools from the insight phase to gather and report the findings has helped to embed research skills amongst the staff and has been integral to the 'research journey' SCARF has been on¹⁴. They say that perhaps the greatest value was that they did it for themselves and feel that they 'own' the findings. Importantly, they now feel able to do it again and see it as a useful way to get the knowledge from the communities they work with into the heart of their business.

- 4.46 The research element of *Better by Design* highlights some creative and less commonly used research methods, and raises interesting questions about the role of formal 'research' in the design-led process and about the importance of the research *process*, the way it is conducted, as much as the research findings.
- 4.47 In terms of the content of the research findings, some felt that it didn't tell them anything they didn't already know or that they believed they could have found out readily for themselves. Amongst the wider sector, this is a common enough refrain about research and some organisations suggested that this gave them reassurance.
- 4.48 In terms of programme delivery, the research element of the design-led approach was not always well integrated and changing this seemed to be logistically difficult. Much of the research was delivered towards the beginning of the programme, before some organisations really understood what they wanted to find out about. As a consequence, there was a sense for some organisations that the research was being 'done to' or 'for' them, rather than with them, although in later phases, some found ways to manage the research in ways that did bring value to the process.
- 4.49 The delivery team themselves struggled with this, and encouraged organisations as much as possible, to consider what they really wanted to know more about, and what would be the best ways to gather that information. The delivery partners noted *'key here is getting the research questions right, and that takes a lot of their time which not all organisations were willing invest.'*
- 4.50 Others felt that they would have preferred to have been supported to do it themselves, or have a peer research model, which has been shown to work

¹⁴ POEMS is a mnemonic that acts as a reminder and prompt for observers; it means 'People', 'Objects', 'Environments', 'Messages' and 'Services' and helps provide structure when documenting insights. Knowledge Swatches are a play on swatches of fabric, paint or wallpaper you might see on an interior designers 'mood board'. They are single sheets of paper that allow people to record key bits of information and insight in one place in order to make it visible, shareable, mobile and to enable people to identify patterns in the data gathered in the insight phase.

well for some organisations. At times the research activities and outputs appear to have been a compromise that was not particularly satisfactory for the organisations themselves or the delivery partners.

Prototyping

- 4.51 Prototyping was at the heart of *Better by Design*. It was a concept used in the programme to enable people to test their ideas, either simply by speaking about them within a meeting or in trying them out in practice:

“Prototyping enables staff ideas to be trialled - not dismissed too soon (by managers) with the comment that ‘Oh, no way...that can’t work!’ which would have made the member of staff feel really let down. It also provides a chance to engage participants.”

- 4.52 One Chief Executive said that the idea of prototyping challenged the idea that everything had to work, which stifles creativity and risk-taking ‘it *made me feel confident to fail.*’ Risk was a key question highlighted by another participant:

“How do you create an environment where you trust and support and enable people to take risks and accept that sometimes it’s going to go a wee bit left field?that for every time it goes a bit wonky, 5 or 6 times it goes really well.”

- 4.53 Aberdeen Foyer has whole heartedly adopted both the approach and many of the tools and techniques. They have developed the case study below of their experience *Better by Design* and this provides a good overview of how the process works and the energy created for continuing innovation.

Comfortable in the ‘crazy zone’ - the journey of Aberdeen Foyer

Aberdeen Foyer secured a place in the *Better by Design* programme with the ambition of refreshing our supported accommodation service; perhaps the organisation’s ‘defining’ service. Not that it was failing or not valued, but more we had doubts that a service developed some 18 years ago was necessarily ‘fit for purpose’ and geared to meet the needs of those now presenting to the service and in the future.

While this ambition was achieved, the programme went much much further than originally envisaged, reaffirming the Foyer’s Mission, Values and Culture and allowing this to be re-articulated, re-affirmed with greater clarity, confidence and shared commitment. At all levels of the organisation we considered our values ‘plumb line’ and found we were in synch.

What clearly stood out was a shared understanding that we are here to enable people to make positive changes in their lives and achieve their aspirations through our services and programmes. We are focussed on the impact we want to make putting employability centre stage. We are confident in our approach of being asset-based and solution focused. The North East is our home and we are part of the wider landscape of support in and for local Communities.

We have fundamentally changed our mindset through which we develop and consider new ideas. The 'Change Team' approach has and continues to provide a safe place and space in the organisation that staff and clients can work through and 'play' with ideas. This has led to shared ownership of developments and people feeling empowered to have more autonomy for taking decisions and making immediate improvements to existing services and processes. Innovation is embedded as *'it's become our DNA; it's not just about the ideas'*.

We have gained stronger capacity to use empathic design to work alongside local authorities, partners and other public bodies to co-create and co-produce new services and programmes that deliver positive social impact.

By using Peer Research we have established a powerful vehicle that places our clients' insights as a key driver in shaping what and how we do things. Our staff have also demonstrated how well placed they are, knowledgeable and experienced in understanding issues and barriers. The User Journey has proved to be an essential means of stepping into our client's space, providing a new discipline and reality check, which, coupled with our Peer Researchers, has challenged us to reduce our assumptions that we know what is needed.

Working through complexity, we know we want to be joined up better across all services and geographies, including our central support functions. We need to perfect communication internally and externally. Improved induction, staff development opportunities and clearer succession planning continue to be high priorities.

Our engagement with external stakeholders through the process has been more limited than first envisaged and is a matter we are building into our future plans. We are however better prepared for that engagement.

We are left with a refreshed organisational strategy that builds on our assets. We have a clear direction and have already tested and implemented service improvements; begun delivering new services and have generated some exciting new ideas for more major developments. We have now built in the capacity to maintain the Change Team approach, embed empathic design tools that will inform our future, learned to be comfortable in the 'crazy zone' of change and above all else, to never stand still.

Working relationships with delivery partners

- 4.54 Thirteen out of the fifteen organisations spoke extremely positively about the contribution of the delivery partners and in particular Taylor Haig who were frequently acknowledged for their commitment, their consistency and their expertise. It was clear from the feedback that they worked extremely hard at developing trusting relationships with the organisations. In two, the relationship broke down early on; the organisations attribute this to a lack of capacity that was not addressed sufficiently to allow them to recover.

4.55 The delivery partners note that the organisations which benefited least from the process were the ones with whom they had least contact at the application stage. Their view was that these organisations had unrealistic expectations. They also note that there needs to be clearer, upfront communication about what a design-led approach actually means; *‘if some can’t see any tangible results, that can lead to disillusion’*.

4.56 Organisations found an external input useful in itself, because it was a fresh pair of eyes and brought expertise from other sectors. Many clearly valued the ‘critical friend’ element of their support and would have liked more of it. Some felt that external facilitators were more likely to be listened to by staff, particularly rather than their own managers:

“...it makes you think, challenging you, and your patterns of behaviour, changing mindsets, makes it safe to say stuff, [they’re] direct but good - very focused and that keeps us on track. It takes the anger out of it and makes it less personal - which helped us to ‘hold it lightly’.”

4.57 In some organisations the quality of this relationship has been an important driver of the process and there are mixed views about whether the process is likely to be sustained without it, as shown here by two members of one Change Team:

“We need to carry forward the impetus - I feel positive that we can do it without the consultants [delivery partners]....I think it will be difficult to sustain it without them. I think the momentum will be lost.”

Application Process

4.58 Several of the organisations mentioned that they liked the process of application. They experienced it as both informative and supportive and it felt significantly different to their normal experience of having to tailor what they needed to funders’ requirements. Chief Executives felt that they were able to be open with the delivery team and admit to their weaknesses as well as their strengths. This was also new for them in their experience of applying for funding. A recurring refrain was that organisations thought *Better by Design* as a programme, was ‘perfect’ for them, and ‘just the right timing’.

“The opportunity to get support to think about how we develop our services was well-timed - we were really pleased to be selected as one of the Better by Design organisations.”

4.59 In consequence, being accepted onto the programme felt like real ‘honour’ to almost all the organisations. The relationship had already begun and there were strong and solid foundations on which to build. It also created high expectations of the programme.

Investing in Ideas

4.60 All the organisations made use of the Investing in Ideas fund, and spoke very positively about the opportunity to do so. They used it for a wide range of purposes including a study tour; financial administrative support; research on impact and fundraising and it has been crucial in freeing up staff time to participate in *Better by Design* activities in several organisations:

“Investing in Ideas was very significant for us. Without that money we couldn’t take staff away from service delivery.”

Being part of a programme and a developing network

4.61 *Better by Design* is a pilot programme that offered ‘packages’ of support through a design-led process, rather than a clear cut single intervention for each organisation, Although design-led approaches have been used in lots of ways, they have never been used in quite this format with 15 voluntary sector organisations across Scotland.

4.62 Whilst many organisations considered themselves privileged to be on the *Better by Design* programme and to have access to an extraordinary level of support and expertise provided by the delivery partners, they had contradictory feelings about being part of a pilot. Many Chief Executives, Board members and Change Team members loved both being chosen, and the radical and innovative aspects of the programme. Some valued a new opportunity to become part of a wider network:

“It’s raised our profile amongst the sector and amongst funders. ..to be one of the fifteen organisations has been really good for us and came at absolutely the right time for us.”

4.63 What was more difficult at times was a struggle with elements of the implementation of the programme, as it was ‘learning by its’ mistakes’. Several realised that it would be a bit of adventure from the start and acknowledged how different it felt:

“We swallowed our fear and went with it. I never once thought I was constrained and had to make it work. There will be no negative comeback - that is really unique in the Third Sector.”

4.64 One Chief Executive had a more sanguine perspective on prototyping such a programme:

“It’s a pretty big achievement to have the guts to roll something like this out and invite organisations to apply...who get’s something right first time? You shouldn’t expect to... If the expectations were to nail it with 15 organisations then the expectations were too high.”

4.65 The *Better by Design* programme provided opportunities to come together as a cohort throughout. Some of these were specifically aimed at networking and feeding back about the programme, others offered specialist input and information. These forged useful relationships between organisations:

‘sharing knowledge has been good. I get as much out of the people as I do out of the process.’

- 4.66 We heard several instances of new collaborations between organisations and practical ways in which they were learning from each other and using their new knowledge. For instance, one organisation had found a new local office space and another was looking at developing a new service together.
- 4.67 A couple of organisations felt like more benefit would have been gained from networking through events such as the *Better by Design* Academy, earlier in the programme and that opportunities to enhance networking and programme learning beyond the group of Chief Executives were missed.
- 4.68 On the whole the earlier events were less useful than the later ones. The investment day in February 2015 got positive feedback. One organisation specifically used it to put a new proposal across to the funders present. The Academy too was generally well-received by the *Better by Design* cohort. They found it a useful way of consolidating their learning about design-led approaches, and were interested in the opportunity to meet a wider network of organisations.
- 4.69 Informal feedback from other organisations at the Academy was more mixed. Some loved the opportunity to think and to learn with others who they wouldn’t normally come across, others were unsure why they had been invited and found the lack of clarity about outcomes frustrating.

Role of the Learning Partner

- 4.70 The role taken up by us, as learning partner has been a ‘light touch’ intervention in itself. For several organisations the discussions during the first visit enabled them to clarify their desired outcomes, challenge the process and start asking for more of what they needed:

“I think there was a bit of a light-bulb moment ... during that meeting both of us hit on the realisation that we had been thinking of this as that type of relationship [with a funder] where you kind of feel grateful. But this was very different ... So, we thought, ‘we need to use it in a way that suits us.’”

- 4.71 One organisation highlighted that they would have liked to have had a more systematic approach to continuous self-review:

“We’ve kind of done it as we go through the process. You know with checking in and checking out of a session - so there is an aspect of that kind of self-evaluation that goes on. The reflection bit.....that’s encouraged. I think that’s useful if it’s just done throughout. It might be more systematic if there were some tools brought to bear on that?”

- 4.72 Another organisation highlighted that the 15 organisations didn’t get chance to design the evaluation themselves.

- 4.73 In taking an overview of the programme as a whole, the Learning Partners proposed a framework for accountability for learning and change called *Learning on the Run*.¹⁵, included in Appendix 1. This was intended to help individuals and organisations gather, reflect on and learn from their experience throughout the *Better by Design* process.
- 4.74 It was expected that it would be adopted and adapted to suit the particular needs and approach of the organisations themselves and relied on the delivery partners to introduce it to the organisations and their encouragement to adopt and adapt the approach. In practice it was overlooked, but during the final evaluation process it was identified by several organisations as a potentially useful idea:

“There’s a sort of informal procedure for looking back but not necessarily evaluating. We’ve not used Learning on the Run. But, I think we probably could do something with this going forward....it’s almost like you need someone to be a conscience of us to actually remind us that we are learning and we’re doing things differently!”

What could work better?

- 4.75 The section above highlights that much of the *Better by Design* programme has worked well, but it has not been an overwhelmingly positive experience for all organisations and there is some learning to be considered to strengthen future design-led initiatives.

Design and delivery: can the programme be more bespoke?

- 4.76 A number of organisations have made a critique of the programme that it should be more ‘bespoke’, by which they meant more tailored to their own particular needs and requirements. This highlights one of the apparent paradoxes of a design-led approach: the organisations were all being taken through a process that, whilst not rigid or prescriptive, does have structure and tools. The partnership delivery and project management arrangements added another layer of complexity and relationship management demands. An unintended consequence of these arrangements was that several organisations commented on feeling ‘done to’ having to fit into pre-existing frameworks at times, which highlights an interesting tension in the process. The delivery partners worked hard to make it as bespoke as possible, but in the end the Young Foundation in particular were offering more discrete ‘deliverables’ at particular times. This ran the risk of detracting from the momentum and the chance to fully integrate all the parts of the process.
- 4.77 When organisations wanted to do something different, in some cases it was possible to adjust the process and they got what they wanted; in others they were told that it was ‘not part of the programme’. Both delivery partners felt frustrated by this, particularly when they felt like they were being

¹⁵ This was adapted from Guba, E.G., Lincoln, Y.S. (1989) *Fourth Generation Evaluation*. Newbury Park: Sage, pp245-250.

asked to deliver products rather than ‘stewarding’ an organisation through a transition.

- 4.78 For some organisations it was clear that they never fully understood how bespoke the programme was meant to be or could be and were left frustrated and perplexed by the lack of flexibility: a few have noted the irony that: *“we didn’t design the design-led approach.”*
- 4.79 This could be interpreted as a resistance to take a design-led approach. But, it does pose useful questions about whether a design-led approach works for everyone all the time, how bespoke it can be and what different organisations need to enable them to make the most of it?
- 4.80 The design-led approach asks clients to contain a level of uncertainty particularly during the early phases. It deliberately takes time to come up with actions and solutions. Almost all the organisations in the programme have become accustomed to being very action focused. Some had to take quick actions over the past year, in order to capitalise on funding opportunities which couldn’t wait.
- 4.81 Many of the Chief Executives are practical, pragmatic and action-focused people. For some the uncertainty felt more like chaos and confusion or simply a failure to deliver:

“Theory of change? Well we still don’t know what that is, I’m afraid. We still don’t have a clue about that.”

“They weren’t explicit enough about what they are doing and did not share their theory. We would have liked to have had the underpinning.”

- 4.82 One Chief Executive spoke of how the lack of clarity in the process made it hard to prioritise it. However the same Chief Executive also spoke of how, by the end of the programme, they were conscious of when they were able to take a design-led approach, and when they weren’t, depending on the situation.

Programme Implementation

- 4.83 There have been some implementation issues in *Better by Design*. Almost all the organisations found the initial pace of the programme too slow. For most of them the time-lag came between the initial design workshop in July-August 2013 and the follow up. Now, most of them would say that the programme didn’t really get going until early in 2014 and consequently they feel that it is ending too soon. Even without the slow start, having the first intervention in the summer of 2013, means that it is not experienced by the organisations as a two year programme.

“The first 6-9 months of Better by Design wasn’t ‘real-time’ as everyone was just getting their heads round it. To be fair, we’ve

only really had about 14 months. Two years sounds a long time, but to shift culture takes more than that.”

- 4.84 One organisation never recovered from the initial lack of engagement. For them, the programme started well and they felt fully engaged at the outset, but by the end of 2013, they were disillusioned with the lack of communication from the *Better by Design* team. They fed their views back and had another period of engagement with the programme in the Spring/Summer of 2014. But from that time on they feel that they have had very little benefit.
- 4.85 The early issues about lack of capacity were never fully resolved. The initial idea that each organisation would have a day a week never fully materialised and many of the organisations were under the impression that the team didn't have the capacity to deliver this level of support.
- 4.86 The organisations were well aware of the clear distinction between the two delivery partners, which particularly in the early months of the programme, was experienced by several as a tension. Some minded more about this than others and would have preferred the support to be more cohesive and more integrated.
- 4.87 The majority felt that they never got the full benefit of support from the Young Foundation. But several specifically mentioned how useful the Young Foundation research and impact work had been and two had ultimately found it more useful than what they referred to as the 'consultancy' input
- 4.88 About three of the 15 organisations appeared to bear the brunt of a lack of capacity and consistency in delivery and some CEOs feel strongly that they have not had the full package of support they anticipated. Given the reporting arrangements, organisations did not feel they had a route back into any governance framework.
- 4.89 By the start of 2014, many of the organisations were beginning to develop the confidence to take control of the process themselves and for most this was highly successful. They found the delivery partners open and responsive to suggestion. However, five never made full use of the 'package', and three made minimal use of it.
- 4.90 As learning partner, we struggled at times to take up our role fully. Some of this can be put down to tensions within the partnership, but it also came down to a lack of clarity about the role and a lack of resources. The budget for evaluation was less than 5% of the total budget for the programme. This meant that opportunities for learning and the integration of learning into the design-led approach were not able to be capitalised on.

Designing to sustain momentum

- 4.91 At its best, the design-led approach challenges a top-down model of change. It advocates the idea that the knowledge and ideas are present at every level of an organisation and outwith the organisation as well. The

organisations which made the best of use of the programme were the ones in which it was possible to engage a wide range of staff, people who use the service and partners and to bring them in as active participants in the process. Organisations understood the huge value in this and it frames their understanding of the challenges as the programme comes to a close:

“I think the challenge is still working with people who are not as bought-in because they’re less involved or less inclined to see the positives and how you can manage to deal with them.”

- 4.92 In one organisation almost all staff were involved at the initial workshop with positive results, but many had not been involved since: *‘they feel undervalued - that their opinions don’t matter!’* For some it just wasn’t practical, for a whole variety of reasons, some of which were to do with weighing up the potential benefits of wider ‘buy-in’ against operational priorities.

“We’re trying to change our patterns of behaviour - operationally it has to be possible - we should weigh it up and take an operational hit to allow the staff to take part. Let them have their say like everyone else. We need understanding and buy-in to the process.”

- 4.93 Others attributed these difficulties to a lack of capacity within the programme and saw a need to develop the internal ‘reach’ of the programme to the widest possible number of people at an earlier stage. It was also suggested that the highly participatory start of the first workshops should be repeated to enhance the level of participation:

“There have been big gaps between sessions: by the time you get round to the wider staff team, you’ll have run out of time!” The real work doesn’t begin until you get these people involved. There needs to be something for everyone as you go along.”

- 4.94 Some understood the challenge at the closing phases of the work to be about how the outcomes of the programme and ways of working could be best communicated to those not centrally involved, not least to ensure that any new service models are not experienced as a imposition as they are ‘rolled out’:

“We thought we’d be better to move away from [calling it] Better by Design. We’ve done that for two years and people would be wondering what it’s about, so we have to find a new terminology around that because if not, people will go ‘Better by Design well we did that for two years! It worked or didn’t work or whatever.’”

Summary

- 4.95 *Better by Design* has been a valued and worthwhile experience for most organisations. Most also say they would be happy to do it again, although all have suggestions as to how to improve the programme to make it more bespoke. Initially largely unfamiliar and sometimes off-putting to

participants, the language, approaches and tools of the design-led process generally made sense by the final phase of the programme.

- 4.96 One of the main benefits was the space and time to reflect in a structured and safe way. Such a chance to pause created a different atmosphere, which enabled different kinds of conversations to take place. Elements of the design-led process brought to light untapped resources, and showed the importance of opportunities for staff to engage with each other, as well as with people that use services. For some, a significant aspect was taking time to think about services from a user or volunteer perspective which helped to reassert the values that brought many people to their work, and created energy, better morale and openness to different ways of working. The chance to learn in this way and the challenge to habitual ways of thinking and doing, have made a significant change to mindsets in a number of organisations and at times, brought a new quality of engagement in partnership settings.
- 4.97 Much of the *Better by Design* 'design elements' of the process have worked well, but implementation challenges have meant the programme has not met some organisations needs or been a positive experience for all organisations. The implications for future programmes are discussed in Chapter 5.

5 Chapter 5 Conclusions and Recommendations

- 5.1 *Better by Design* was an experimental and ambitious programme, which achieved impressive results for the majority of the organisations which took part. There are useful indicators that the process is likely to support long-term sustainability, by creating greater organisational resilience that enhances learning about how to ‘do’ change in response to new challenges. In acknowledging this work as both complex and inevitably ‘unfinished’ there are some new foundations being put in place that will better equip organisations to meet the needs of the beneficiaries now and in the future:

“It’s not going to be a highly robust organisation by March but what we’ve got is a lot of building blocks towards that and that will develop this year.”

“We’ve not got a new service design, but in some ways we’ve got more than that.”

- 5.2 Organisations tended to talk of having planted the seeds, or being further along on the journey. Important elements that give them more confidence in the future include greater engagement with and by staff; a more proactive than reactive stance; stronger partnerships and shared responsibilities; the development of new and different models of services; changes to funding opportunities; a renewed focus on putting people who use services at the heart of them; a better understanding of prevention and greater understanding of and ability to demonstrate impact.
- 5.3 For the most part, both partners delivered extremely high quality design interventions, across the two years of the programme, which were much appreciated by the organisations. All parties worked hard to resolve differences between them and the commitment of the delivery partners, to putting the beneficiary organisations first at all times, cannot be doubted. Few organisations had a clear sense of what the alternative approaches to design-led methods might be. For those that benefited there is no going back: *‘It’s hard to imagine what you go back to? It’s becoming integral.’*
- 5.4 All the organisations were operating within the constantly challenging conditions of the sector. These include positive changes such as new contracts or business opportunities, but also financial fragility of some services, and at times, turnover of key staff. However, there is no clear connection between those organisations which experienced the most upheaval and their ability to participate in or benefit from the programme.
- 5.5 Given these conditions, the delivery partners emphasise different factors that they believe are the most pertinent to enable organisations to make the most from the process:

“... an open-minded Chief Executive who is prepared to loosen the reins is helpful as is an organisational culture that is more welcoming of a design-led approach.”

“we found organisations tended to engage most actively with things they are already relatively good at - it has been the organisations that self-assessed themselves as having the furthest to go that have been hardest to engage in support and vice versa.”

The value of capacity building support

5.6 We asked organisations whether they thought the programme had been worthwhile and whether it had been value for money.¹⁶ The majority of the organisations thought the programme had been worthwhile. Some thought that they would have got more out of it, had they been able to put more into it themselves. About half went on to say that that they thought it was value for money, although some felt it was too soon to make that judgement or that it should be made on the basis of thinking more broadly about the social value of the programme.

5.7 Of the rest, most thought that the delivery partners had been worthwhile, but that they hadn't had enough time from them. One or two, might have recruited consultants or different specialist input, and some did so with their Investing in Ideas money.

“I don't think we got that much -there could have been a lot more - I am not saying that the consultants are not worth what they are paid. But the format they were presented to us in devalued their inherent value.”

5.8 All thought that the Big Lottery Fund Scotland giving money expressly for the purpose of capacity-building within organisations was a good idea:

“It is a good thing that this opportunity for really high quality management consultancy is given to small charities....It is exactly what that kind of money should be spent on to allow a charity to flourish.”

5.9 Beyond that though, approximately one-third would have liked the flexibility of having access to the funding themselves to spend on the consultancy they wanted as a way of making it more bespoke:

“We could have managed the money differently if we had been given it.”

“I would love the opportunity to do it again- I would be the shopper! It needs to be a conversation on a level-playing field. There would be a better result for service users if I was able to be much freer about using the money and deciding on the process.”

¹⁶ The *Better by Design* application process stated: ‘We are looking for organisations to apply to take part in a supported process valued at more than £50,000 to each organisation that takes part.’

“If I was to get £50,000, I would want it from one organisation - two different organisations, two different approaches and two different lots of jargon. An organisation would naturally fit with one or the other.”

- 5.10 The other two-thirds were clear that they wouldn't have wanted to manage the money, with some suggesting that would not have got to where they are now if this had been the case, or that they would probably have adopted a more familiar approach, which would have not been as useful:

“I wouldn't have been able to afford to have a consultant work with me for that amount of time...what a worthwhile investment...transforming the mindset of statutory sector organisations.”

Does the design-led approach work?

- 5.11 More than two-thirds of the organisations highly valued the design-led approach and appreciated the design expertise on offer. For them it can be said to have worked well, and they experienced real transformation through it.
- 5.12 Almost all the reservations expressed about the programme in Chapter 4 were to do with the implementation of the approach. Two things in particular presented barriers for the minority of organisations, which did not benefit in the way they had hoped. One was the language, which some people always found unnecessarily complex; and another was the level of uncertainty inherent in the process. When this uncertainty was combined with a lack of cohesion in the partnership, and a failure to deliver on timescales, it was experienced as chaos.
- 5.13 At times it felt, even to organisations that found it useful, that taking a design-led approach to the whole organisation, rather than focusing on service design in a particular area was too ambitious.
- 5.14 The organisations which benefited from the programme, which are the majority, would recommend running it again for a new cohort. Several organisations recommended that any future programme directly addressed collaborations between organisations and can see the wider value to the sector:

“I would recommend it to any organisation, especially one that's emerging from a troubled time and wants to find its direction. It would be a really good thing to do as a way of supporting mergers in the third sector - that's when you need to talk about your values. It's the small ones that are teetering on the edge - they're the ones doing great things. We need to retain what's good about them. And a design-led approach would support that so that the essence of the small one isn't lost and really get to the whole being greater than the sum of the parts.”

5.15 They see it as an innovative methodology for the third sector and their partners. It enables organisations to:

- Harness skills and creativity they already have and connect it to what they need.
- Explore and take the time to dig deeper, develop true curiosity and open-mindedness.
- Generate and share ideas through visualisation.
- Bring the perspectives of people that use services to the fore.
- Bring internal and external stakeholders together with a new quality of collaboration.
- Reconnect with values and develop renewed clarity and purpose.
- Embrace failure (earlier) by trying things out.
- Be assets and strength focused.
- Think more clearly about their impact and measure it better.
- Generate vision and excitement about change at all levels of the organisation.
- Be more resilient and continue to learn to meet changes and new challenges.

5.16 This report shows that design-led approaches do have a great deal to contribute and we wish to endorse the recent NESTA report in this respect:

“Design has a great deal to contribute - but the grandiose claims made at times over the last decade have often been more a hindrance than a help. Designers now need to find a humbler tone, to pay more attention to results, to attend to the ‘deep craft’ that’s needed for successful public innovation, and to recognise that they are most likely to achieve their best within teams bringing together complementary skills.”¹⁷

Implications and recommendations

5.17 This report is an endorsement of the real potential of design-led approaches and here draw out some implications and recommendations to improve the prospects for implementation of similar programmes and help to create a design-led culture of collaboration and mutual learning. This is needed to meet the challenges facing the voluntary sector and their partners in Scotland.

5.18 The Big Lottery Fund Scotland was only able to support a design-led approach in one part of the system, the voluntary sector. The programme has highlighted that design-led approaches may challenge prevailing commissioning models that pre-determine outcomes reflecting funders’ priorities and require prescriptive approaches. It has illustrated some of the

¹⁷ Geoff Mulgan (2014) Design in Public and Social Innovation, What Works and What Could Work Better, NESTA

barriers to the adoption of such collaborative and experiential approaches to organisational change, as well as how it can be possible to work with and influence commissioning partners.

A systemic approach

- 5.19 Commissioning and funding practice at both a national and local level can actively work against organisations adopting a design-led approach, by predetermining outcomes, setting unrealistic timescales and adopting monitoring and evaluation practices that become a reporting duty rather than a chance to learn. In this context;
- a) Both Big Lottery Fund Scotland and the *Better by Design* organisations should use their influence to highlight the benefits of a design-led approach to ensure organisations are more sustainable in the longer term and benefit people who use services.
 - b) We recommend that Big Lottery Fund Scotland use their experience of commissioning a design-led approach to take some time to examine the lessons of the approach for their partnerships with delivering agencies and with organisations. In particular, whether:
 - Having learnt the lessons from the initial cohort, there is scope to support a further *Better by Design* cohort, which could be focused thematically using design-led approaches to enhance collaboration across agencies in a geographical place.
 - There is value in a design-led approach to commissioning and funding so that systems and contract requirements are tailored to suit beneficiaries of their programmes. For instance: direct contact with the organisations themselves, going out to visit projects and viewing the work in action and more bespoke performance management reporting structures which still provide accountability for use of resources and planning.
 - c) Designers and commissioners should be clear about the complementary skills that partnership approaches may offer. Commissioners should examine any evidence of previous collaboration before commissioning a partnership approach in order to ensure the full benefit of a truly integrated and systemic design-led process.

Programme Design

- d) The application process worked well and could be replicated by the Big Lottery Fund Scotland and other funders. In a competitive funding climate, it is important to continue to encourage organisations to be truly honest about their challenges, so that they understand whether they are in the right place to be part of such a programme. This kind of frank dialogue with applicants creates a stronger foundation for working together.

- e) Whilst the formal programme duration of at least two years felt about right for most, programme length should include the time taken to complete the selection process, so that organisations get the benefit of the full proposed term of the programme.
- f) The programme criteria should stress the need for the commitment of the senior management team within a participating organisation.
- g) There is value in creation of a cohort of organisations and deliberately brokering new networks of peer support for the sector. There should be more opportunities for people other than CEOs to meet up, for example, Change Team members, fundraising staff or volunteers.
- h) Any innovative programme will involve failure and attrition; programme design and implementation arrangements should retain flexibility in the deployment of resources and enable organisations to withdraw early should they wish to, without loss of prestige or fear of future funding consequences. The ability to expand or contract the level of support provided is essential.
- i) There is value in non-financial support to build capacity in the voluntary sector and future programmes should work on this ‘mixed model’ that retains at least an element of ‘support in kind.’ Delivery arrangements should aim to be as simple as possible for the organisations as a client.
- j) There should continue to be access to dedicated funding for specific needs. Access to ‘Investing in ideas’ type funding could be simplified so that organisations did not have to apply directly and they could adopt a ‘participatory budgeting’ type approach.
- k) Future design-led programmes should be framed much more explicitly and from the beginning, as a collaborative inquiry in themselves. This would signal clearly the innovative and experimental approach and would help to create the right climate for genuine learning and sharing.
- l) There should be a clearer definition of the role of the learning partner, particularly in relation to a design-led approach, and a more substantial commitment to the integration of learning, which is reflected in a proportionate budget, in any future programme.

Design-led approaches

- m) Future programmes should retain the integrity and coherence of the four phase design-led approach and ensure that the underlying theory of the approach is shared and integrated at appropriate stages.
- n) Publicity and communications need to be kept clear and simple to explain the process and its demands more clearly, at the outset, and relate the process to the goals of the organisations.

- o) Future programmes should help organisations understand the distinctive offer of research and the potential benefits of a different kind of research process in a design-led approach, including the value of peer-led research. It would also be helpful to more clearly distinguish between research as insight gathering or exploration and ‘research’ as evaluation of outcomes.
- p) The design-led process should ‘design-in sustainability’ more explicitly by striving to enhance the engagement and participation of staff and participants in the wider system of which each organisation is a part. This should be a recursive process that develops and expands throughout the process.
- q) Designers need to foreground and embed learning and help to create more systematic ways to generate learning by bringing the work of design and ‘formative evaluation’ together in ‘real time’, in the midst of the work itself. This will enhance understanding of the distinction between formative evaluation that supports learning and summative evaluation that measures ultimate outcomes. Greater attention should be paid to how design tools, objects and outputs themselves produce useful evaluative data.
- r) Criteria for judgements about validity, quality and success should be developed collaboratively (at the start) in ways that fit with the overall purpose of the work and the values of those involved. These could lead to evaluation outcomes and indicators that provide accountability for learning and change.

Appendix 1 Learning on the Run

What we are looking for from *Better by Design*

This Learning Framework is designed to help individuals and organisations think about their learning throughout the *Better by Design* process and to help them become more conscious of what it is about the design process that is helpful so that they can continue to use it after the BBD programme ends.

You can use *Learning on the Run* to:

- Check in and review progress from time to time - it need not take long
- Share thoughts about what is working and what needs to change to make it even better
- Record and share insights and ah-ha moments
- Check-out what others are thinking
- Talk about design - What is it that helps? What gets in the way? What seems to be important or distinctive about it?
- Talk about your desired outcomes -Are you on the right path? How are you doing?
- Record evidence as it emerges so it is not lost and can influence the next stages of the process

Learning on the Run

Knowing more about me in my role

- What new insights do I have into:
 - how I tend to see things?
 - what I take for granted?
 - how I typically act?

Knowing more about people and organisations that matter to us

- What new insights do I and others have about:
 - how other people that are important to this organisation tend to see things?
 - what they take for granted?
 - how they typically act?

Ideas for what might change

- What new ideas do we have for things we can each:
 - do for ourselves, and
 - do with each other

to help us achieve our goals as an organisation?

Real change in the way we do things round here

- What new ways of working are we now using that help us achieve our goals as an organisation?

Positive impact of BBD

- What are the most important ways in which this organisation is changing as a result of *Better by Design*?

Fairness and balance

- How do we know that this process is inclusive and fair?
- Are we listening to those people that are seldom heard around here?