

What we have learnt  
about the design  
and delivery of  
innovative and  
complex programmes.

LET'S  
TRANSFORM  
AGEING  
TOGETHER.



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**Introduction:**

Our Approach to  
Innovation and  
Learning on

**Transform Ageing.**



In this paper we explore some learning from the design and delivery of Transform Ageing - a programme which examines the different ways innovation can be fostered; using design thinking, a learning approach, and supporting new solutions developed by social entrepreneurs.

Launched in 2017, Transform Ageing aims to improve people's experience of later life. It is an innovative programme that brings together collaborative design techniques and social entrepreneurship to create a new generation of user-led health and social care solutions which tackle the priority issues of people in later life.

Funded by The National Lottery Community Fund, it is led by Design Council, alongside UnLtd (the Foundation for Social Entrepreneurs), the South West Academic Health Science Network (SW AHSN), and the Centre for Ageing Better. Running in Cornwall, Devon, and Somerset, it is supported locally by delivery organisations, overseen by a Programme Governance Board, and delivered by teams drawn from across the partners.<sup>1</sup>

Throughout the programme, we sought to foster innovation<sup>2</sup> through:

1. Design workshops and design thinking.
2. Using learning and developmental evaluation to iterate and improve the programme as it develops.
3. Supporting social entrepreneurs to develop new products and services or bring successful innovations into the South West.

This way of working has enabled us to:

1. Connect local people and decision makers to build a picture of needs in their area.
2. Spot gaps in our model and respond with new ideas when things can be improved.
3. See innovations started in the South West grow to new parts of the country.

As a result, 46% of the social entrepreneurs we have supported are aged over 50, creating hundreds of jobs, suggesting we have succeeded in supporting a local market of non-statutory services to meet the needs of local people in later life.

In this paper we reflect on what we have learnt about what it takes to embed innovation into a programme; what makes it work and what some of the barriers have been.

## How we developed this paper

On Transform Ageing, we brought together developmental and theory-based evaluation. This means that alongside a Theory of Change and evaluation framework, we ran reflective sessions and used a learning framework to gather insights from programme delivery and feedback to programme delivery staff through Learning Highlights Papers (for more information about how we developed our approach, see our paper, 'Learning about Learning').

This paper draws on learning highlights papers, reflective session notes, evaluation papers, and interviews with social entrepreneurs. It explores some of the ways that the programme has developed and responded to key learning points throughout.

We have built our learning around three key areas; the use of design thinking, using a learning approach, and supporting social entrepreneurs. In the final section we reflect on what we have learnt and suggest some recommendations.

In January 2020 we will publish a final report which will reflect on what has happened in the South West as a result.

Transform Ageing is delivered by:



<sup>1</sup><https://www.designcouncil.org.uk/what-we-do/social-innovation/transform-ageing>

<sup>2</sup>To understand what we mean by innovation, see our glossary on p. 5



# Glossary of **Transform** Ageing.

## Award Making

Transform Ageing has provided three types of awards: Inspire awards, Early Stage awards and Venture awards. Inspire awards of £500 were introduced part way through the programme as a way to nurture the innovative ideas that were developed in the *Explore the Challenge* workshops. Early Stage awards, for social entrepreneurs seeking to begin or develop their enterprises, were split into 'Do It' and 'Grow It' awards. These provided up to £5,000 and £15,000 respectively. Social entrepreneurs wanting to expand their enterprises could apply for Venture awards, or 'Scale It' awards. These awarded between £25,000 and £50,000, with further funding made available for the lower awards.

## Delivery Organisations

To ensure the programme represents the areas in which it is being delivered, Volunteer Cornwall, Devon Communities Together, Community Council for Somerset, and Torbay Community Development Trust act as delivery organisations. Their role is to help to support programme delivery in the South West, as well as to recruit and support social entrepreneurs. They provide access to local networks (either entrepreneurial or health and care sector) and have connections to people in later life living in their local communities.

## Innovation

Innovative solutions are in a state of continuous development and adaptation. Rather than just being about trying something new, they are designed to change in

response to unpredictable environments.<sup>3</sup> As a result, they are particularly suited to addressing complex challenges.

## Programme Governance Board

The programme is overseen by a Programme Governance Board (PGB) that is comprised of representatives from each of the partners (Design Council, UnLtd, SW AHSN, and Centre for Ageing Better). As well as setting the strategic direction of the programme, the board is also accountable for the use of the grant across the programme.

## Other Teams

In the South West, the delivery team is comprised of programme staff and award managers from three of the delivery partners, who work with organisations to find, fund, and support social entrepreneurs. Although it brings together staff from different organisations, it operates as a single team to drive the successful delivery of the programme.

'Marcomms' is the Marketing and Communication branch of the programme. Specialist staff from each of the partners work with the delivery organisations to reach out to potential applicants and promote the story of Transform Ageing.

More information about programme can be found [here](#).



<sup>3</sup>Jamie A. A. Gamble, A Developmental Evaluation Primer (2008) [online], p. 15 (accessed 19 September 2019)



What  
we have  
learnt.



# 1. Design Thinking

*To understand the needs of people in later life, design thinking is most effective as an ongoing process of discovery and iteration, rather than one-off workshops.*

During the summer of 2017, Transform Ageing brought together people in later life, social entrepreneurs, health and social care leaders, partner organisations and delivery organisations. Over a series of *Explore the Challenge*<sup>4</sup> workshops, participants went out, researched their local communities and collaborated to highlight specific and general issues faced locally by people in later life.

Partners combined the information and created six Innovation Briefs which outlined key areas of action. This phase established the criteria through which social entrepreneurs could apply for awards.

## We thought that...

By involving local people, decision makers and social entrepreneurs in the process we would develop a community of people with a shared understanding of what was needed locally, ensuring products and services were targeted at specific need and delivered into a market ready to pay for them.

The Innovation Briefs would provide inspiration for social entrepreneurs, who could respond with ideas which both met the needs of local people and found a route to market through local commissioning.

## We found that...

Involving people in later life in the *Explore the Challenge* phase gave us confidence that the priorities set out in the Innovation Briefs were driven by local needs. It set a high bar for social entrepreneurs to demonstrate that their solutions were tailored to the needs of their beneficiaries.

However, by the time they were ready to apply, social entrepreneurs had already started taking on feedback and adapting their model to fit people's needs. Although they might not have seen this as a 'discovery phase', it served a similar purpose, reducing the value of the Innovation Briefs.<sup>5</sup>

Whilst the Innovation Briefs weren't used by social entrepreneurs in the way we anticipated, design thinking tools encountered in the *Explore the Challenge* workshops and a design toolkit proved popular with a wide range of stakeholders. This suggests that to understand the needs of people in later life, design thinking is most effective as an ongoing process of discovery and iteration, rather than one-off workshops.

We also found that we needed to pay more attention to how we worked together and how we used the Innovation Briefs once they were developed.

## Unintended Consequences: Using Design Thinking

*People who came to the Explore the Challenge workshops told us how much their work benefitted from better understanding the co-design process. For example, some social entrepreneurs applied co-design ideas and processes into their own work and structure. One commissioner said that they began to consider 'co-design' rather than 'consultation'.*

*This suggests that the Explore the Challenge workshops were more impactful in sharing design thinking, than creating a shared understanding of local needs and that design thinking is more effective as an ongoing process, than a one-off event at the outset of the programme.*

*The final evaluation will pay attention to how using design thinking has affected the work of social entrepreneurs, delivery organisations, and public sector leaders.*

<sup>4</sup> For more information on the Explore the Challenge phase, see our report.

<sup>5</sup> We explore this in more detail on page 11.

## Spotlight on: Collaboration and Design

*On Transform Ageing, we used the Design Council's Double Diamond model to structure our work. The Explore the Challenge workshops and Innovation Briefs were intended to Discover and Define the problems we were seeking to tackle and we then supported Social Entrepreneurs to Develop and Deliver solutions to the respond to the Innovation Briefs*

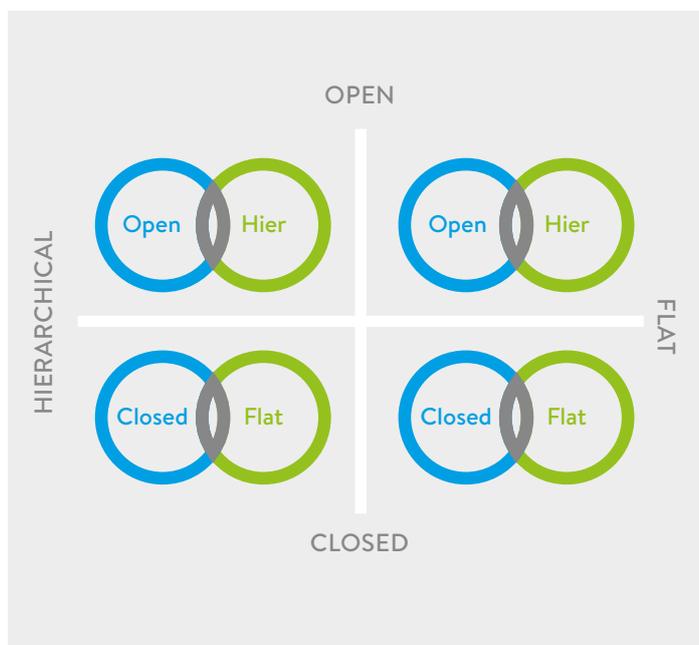


Figure 1: Collaboration Matrix developed by <http://www.designingcollaboration.com/>

*This tool shows how different collaboration styles can be planned according to open and closed participation and hierarchical or flat decision making. Rather than a correct approach, effective projects can make use of multiple approaches in different stages. The website provides more information on the value of the different approaches.*

### How we worked together...

Transform Ageing used different collaboration styles (see Figure 1) at different stages of the programme, often to great effect.

#### Collaboration worked well when:

- We used an open and flat approach to participation and decision making for the *Explore the Challenge* workshops, empowering delivery organisations to bring in a wide range of voluntary sector organisations and people in later life, creating excellent networking opportunities and space to build relationships across the South West.<sup>6</sup>
- We involved delivery organisations to include them more in the second phase of the programme. As a result, they:
  - a. Developed and administered a new type of award, the 'Inspire Awards', to people in later life who had attended the workshops and had entrepreneurial ideas to develop.<sup>7</sup>
  - b. Provided a route to market for Scale It ventures by connecting social entrepreneurs to people in later life and promoting new products and services coming into their communities.<sup>8</sup>
  - c. Linked social entrepreneurs with known gaps in provision and fostered relationships between commissioners and people in later life.<sup>9</sup>

#### Open & Hierarchical

Anyone can contribute but the person, company or organisation in charge of the project decides which ideas or solutions to develop.

#### Open & Flat

There is not an authority who decides which innovations will be taken further because anyone can contribute in the process and use delivered results.

#### Closed Hierarchical

The participants have been chosen by the authority who also decides which ideas will be chosen and developed.

#### Closed & Flat

The group of participants chosen by an authority share ideas and make the decisions and contributions together.

<sup>6</sup> Notes from Phone Interviews with Social Entrepreneurs', (April 2019)

<sup>7</sup> Transform Ageing Staff Reflective Reflective Log (14th September 2018)

<sup>8</sup> Transform Ageing Staff Reflective Reflective Log (14th September 2018)

<sup>9</sup> Design Council, 'Transform Ageing Evaluation: Phase 2 Interviews with Delivery Organisations' (September 2018)

Whilst this approach helped to foster innovation, we didn't proactively plan or think about the best way to collaborate. This meant that we did not always use the right style for the task in hand, or we shifted approach without communicating what that meant for other people involved

This created barriers to taking innovations all the way from the design workshops through to sustainable solutions in the market:

- **We didn't consider how our collaboration style was changing and how that impacted the people we were working with:**  
In the second phase of the programme, our work with the delivery organisations made more use of the closed and hierarchical approaches. Whilst this might have suited the work we were doing, we didn't pay enough attention to what this meant for them and how they engaged with the work.

- **We weren't clear enough with people about how we could collaborate together:**  
Participants were inspired by the *Explore the Challenge* workshops<sup>10</sup> but thought that they would be more involved with delivering solutions. This was not accounted for in the programme structure and was particularly true for people in later life.<sup>11</sup>
- **We weren't always able to mobilise the collaboration that we wanted to:**  
Commissioners were unable to consistently attend the workshops meaning they weren't as connected to the ideas being developed as we anticipated when we designed the programme. This meant their perspective was missing from the Innovation Briefs, and we had to look at other ways of opening up routes to market for social entrepreneurs.

In future programmes, we will reflect as a partnership on which collaboration styles might be most effective in different stages and share our thinking with those we want to work with.

## How we used the Innovation Briefs....

We also found that how the Innovation Briefs are used is just as important as how they are developed. Social entrepreneurs used the briefs in different ways, for example:

- Adapting their idea to fit a brief, rather than developing something new.
- Finding a brief which fit an idea they already had.
- Only paying attention to them when applying.

We think there are a few possible explanations for this:

- By bringing together the information from across all four areas and amalgamating them into six general briefs, some of the highly local detail got lost, limiting how useful they were to social entrepreneurs.

- Each social entrepreneur has their own discovery phase, either through their lived experience or as part of the development of their venture. The Impact Measurement toolkit helped them to refine and articulate the change they wanted to make more than the Innovation Briefs.

In January 2020, we will publish our final evaluation which will explore this in more depth. However, the *Explore the Challenge* workshops did give participants an understanding and positive approach to design thinking and co-design methods.

<sup>10</sup> 'Draft Notes from Phone Interviews', (April 2019)

<sup>11</sup> Design Council, 'Transform Ageing Evaluation: Phase 2 Interviews with Delivery Organisations' (September 2018)

## 2. Using a learning approach - to reflect, learn, and adapt

*Using programme learning to drive change works best when the programme structures are flexible enough to support change and innovation.*

### We thought that...

Embedding learning throughout the programme from an early stage would enable us to adapt and improve the programme as we went. This flexibility would mean we would be able to respond to needs as they emerged, change what wasn't working and stimulate innovation.

### We found that...

On Transform Ageing, there was buy-in across the partnership teams and Programme Governance Board to make changes based on what we were learning.<sup>12</sup> Having flexibility and agility built into the programme structures enabled us to:

- Introduce top-up awards for social entrepreneurs, helping organisations like Personal Alarm Watch meet their first orders.
- Pivot away from a focus on commissioners to a broader range of routes to market support for social entrepreneurs.
- Give a bigger role to delivery organisations to better reflect their expertise and the value they added to supporting social entrepreneurs. This meant updating the Theory of Change, programme objectives, and indicators.

However, making changes was still often harder than we thought it would be; on Transform Ageing there were specific barriers to being able to adapt to what we were learning:

- Overlapping and sometimes inflexible layers of accountability between the delivery team, programme governance boards and partners, meant staff weren't free to adapt as things emerged.
- Using a results-based management approach, with success defined by meeting objectives, set a high bar for justifying any changes.



<sup>12</sup> Staff Reflective Log (22nd June 2017)

## Spotlight on: Adaptive Programming

*Adaptive programming is an approach to programme management designed to recognise that change is inevitable and builds in ways to use learning to support adaptations.*

*Coming from international development, it recognises that circumstances on the ground can change quickly and unpredictably. Using this approach, programme management is seen as a function which enables and supports, rather than drives programme delivery. It emphasises putting learning at the centre, to inform the adaptations being made.*

*Key aspects of adaptive programming include finding new ways to tackle problems as they emerge whilst still meeting the programme accountability requirements and managing power dynamics within and across programmes with different teams, partners, and interests.*

Results-based management and a learning approach have their own strengths, but we found that tensions can emerge when combining them.<sup>13</sup> Sometimes this played out across the partnership and sometimes it operated at the level of individual teams. A more adaptive programming approach might include:

- Empowering the delivery team to drive change, supported by plans, targets, and budgets, rather than the other way around.
- Investing in understanding and building relationships across the partnership and wider stakeholders early on to manage competing interests, such as priority stakeholders or audience, organisational values and timelines, and non-negotiable needs.

- When designing the evaluation and reporting, agreeing what has to stay the same during the programme and what can be changed, as well as the process for agreeing changes.

The conclusion sets out more detailed recommendations for addressing this tension on page 13. This tension is something we will also reflect on in our final evaluation.



<sup>13</sup> <https://www.odi.org/publications/10367-putting-learning-centre-adaptive-development-programming-practice>

# 3. Supporting Social Entrepreneurs

*Bringing existing products and services into a new place requires as much innovation work (and support) as developing something new – and adaptation is an ongoing process.*

Between October 2017 and November 2018, UnLtd made 63 awards totalling over £800k and provided 12 months of non-financial support to social entrepreneurs. This included several social entrepreneurs who received a second award during the programme, and 14 Inspire awards administered by delivery organisations.

Each social entrepreneur responded to one of the six Innovation Briefs that was developed during the *Explore the Challenge* phase. In addition to supporting the development of local enterprises, we worked with 11 ventures already delivering work in other parts of the country to come to the South West and scale up their innovation.

## We thought that...

As well as supporting social entrepreneurs in the South West to develop new products and services, we wanted to show how supporting the growth of existing ventures into new areas can help to scale impactful solutions.

## We found that...

Bringing an existing product or service into the area can take as much work as setting up something new – even with the support of the programme and delivery

organisations. The ventures we supported were surprised by how long it took and the scale of the challenges that they faced. Some of the barriers to spreading innovation include:

- Working with an unfamiliar public sector approach, with different priorities and ways of working.
- Geographical distance from an organisation’s base to the South West made it harder to oversee and drive the work.
- The region’s rurality made it difficult to understand the nuances of local barriers to exclusion like bus timetables and farming schedules.<sup>14</sup>
- Whilst some social entrepreneurs successfully engaged public sector leaders, it either happened late in the programme, or through their own links.

## This meant that

The 11 ventures we supported to move into the South West all used user-led design and continuous learning to be adaptable, iterative and reflective to establish their venture in the region. In addition, through Transform Ageing’s support, several social entrepreneurs who started in the South West were able to grow their impact beyond the region into new parts of the country.

At no point in the growth of a social enterprise is innovation, design, iteration, and adaptation finished and those that took longer to adapt saw their progress stall. For example, one venture that moved their service into the South West, found their success limited whilst they stuck to their established model, and only started to make progress when they pivoted their way of working, suggesting support to innovate needs to be offered throughout a social entrepreneur’s journey.

<sup>14</sup> How Social Entrepreneurs are Transforming Ageing; the lessons so far (SW AHSN July 2019)



Some concluding  
thoughts and our  
recommendations

Based on our experience of embedding and fostering innovation on Transform Ageing, we found that:

1. For design thinking to work best as an ongoing process, it needs the tools, structures, and process to support it throughout the programme.
2. Using programme learning to drive change works best when the programme structures are flexible enough to support change and innovation.
3. Bringing existing products and services into a new place requires as much innovation work (and support) as developing something new – and adaptation is an ongoing process.

From this, we would suggest the following recommendations to others looking to foster innovation in complex systems:

1. **Plan and share how you want to collaborate.** Consider how the programme wants to work together at different stages from the outset. Be prepared to review it and pay attention to how people move between different approaches.<sup>15</sup>
2. **Use design thinking as an ongoing process.** When working in complex situations, needs will often change. Consider whether the problem requires a one-off design event or if it is an ongoing process over the course of the programme.

3. **Build around adaptability.** Plans, targets and budgets are useful tools for driving conventional programmes but they create strict parameters. In adaptive programmes, technical leadership empowers front-line staff to learn by doing and be adaptive. Financial monitoring and staff management are used to support adaptive programme delivery, rather than drive it.<sup>16</sup>
4. **Managing power and interests.** Pay attention to creating and maintaining strong relationships between stakeholders – understanding organisational values is as important as shared deliverables.
5. **Agree what this means for programme reporting – especially if you encounter unexpected barriers.** Transform Ageing encountered barriers typical to many programmes – staff changes, delays, and shifting priorities. Communication about what is happening across the programme and having agreement at every level on what can change and what needs to stay the same facilitates timely changes.<sup>17</sup>
6. **Innovation never stops and needs ongoing support.** Even social entrepreneurs (or programmes) that have worked well once, will need to be able to innovate and adapt to deliver in a new area or with a new audience.



<sup>15</sup> <http://www.designingcollaboration.com/>

<sup>16</sup> <https://oxfamblogs.org/fp2p/how-do-you-do-adaptive-programming-two-examples-of-practical-experience-help-with-some-of-the-answers/>

<sup>17</sup> Learning about Learning paper

# Appendix One: Innovation Briefs

The Transform Ageing team has been working to connect the needs and desires of local people in later life, with the innovations and ideas of social entrepreneurs. We have developed six innovation briefs for ambitious social entrepreneurs to apply their creative expertise to in Somerset, Devon, Torbay and Cornwall.

## Steps to a positive future

People in later life have positive experiences of ageing.

## Mobility and transport

Enhancing independence and wellbeing through improved mobility.

Each innovation brief was developed in collaboration with local people to capture their perspectives, experiences and insights into what will make a difference in their communities.

The briefs are designed to encourage social entrepreneurs from the south-west and around the UK to launch new services or products in the region, to directly meet the needs and desires of local people.

## Life Transitions

Supporting people to prepare for life changes.

## Caring about carers

People in later life have positive experiences of ageing.

## Right Information, right time

Making information accessible, relevant and meaningful.

## Making connections

Creating opportunities for people in later life to connect with other people, communities and activities.



# 「TRANSFORM」 「AGEING」

Designing a better  
experience for later life.