Better By Design

A Users Guide
## Contents

### Design-Led Change

- **06** Why Design?
- **08** All Aboard
- **10** Change Teams
- **22** Empathy
- **24** Research in The Design Process
- **46** Insights to Opportunities
- **48** Ah . . . I See What You Mean
- **56** Cultural Patterns
- **65** The Soft Stuff is the Hard Stuff

### Tools and Methods

- **12** Studio Style Working
- **14** Indispensable Tools
- **26** The Three Horizons
- **28** Exploring Trends
- **30** Real Life Stories
- **32** Building Your Own Real Life Stories
- **34** Organisational Health Scorecard
- **36** Mapping Your Customers Journey
- **40** Storyboarding
- **50** Prototyping
- **58** Engagement and Participation
- **60** Sustaining Impact
- **62** Sustaining Collective Impact

### Stories

- **18** Norma Philpott talks about CARF’s Change Team
- **42** Exploring Food Poverty
- **52** A Big PLUS
- **64** Sam Law of Tullochan tells their story of Better by Design
Design is essentially a multidisciplinary endeavour that values different skills, knowledge and ways of being in the world as a source of creativity and innovative problem solving. Reading this book you might recognise tools and approaches from a range of familiar disciplines. We see this as characteristic of the richness of the design approach.

It’s helpful not to be able to describe design in hard and fast terms. It is not ‘action research’ or ‘community learning and development’ or ‘appreciative inquiry’ or ‘Lean’ or ‘PDSA’. But at the same time it is.

That’s not to say that ‘design’ has some higher value or lofty purpose. It is just to say that, fundamentally, design is about what works.

Some designers have a knack of making things look beautiful and tidy; like it was obviously supposed to be like that. This ability to synthesise, organise, colour-code and collate belies the reality of an experience that is not always straightforward, obvious or elegant. The now ubiquitous ‘double diamond’ is a case in point: a helpfully innocuous way to describe a design process. The simple symmetry of the two up-ended boxes suggests not venturing outside so much as just setting them on edge slightly.

The reality of the design process is that it is challenging. It means looking at things anew, challenging the status quo, venturing outside of the comfort zone and being open to new possibilities.

Better by Design was an experiment, funded by Big Lottery Scotland to explore the potential of design to support third sector organisations in becoming more sustainable and increasing their social impact. The results were impressive.

This book introduces the methods and mindsets from Better by Design. If you’re new to design, I hope this book inspires you. If you were part of Better by Design, I hope this both brings back memories and encourages you on your journey from here.

Design is essentially a multidisciplinary endeavour that values different skills, knowledge and ways of being in the world as a source of creativity and innovative problem solving. Reading this book you might recognise tools and approaches from a range of familiar disciplines. We see this as characteristic of the richness of the design approach.

It’s helpful not to be able to describe design in hard and fast terms. It is not ‘action research’ or ‘community learning and development’ or ‘appreciative inquiry’ or ‘Lean’ or ‘PDSA’. But at the same time it is.

That’s not to say that ‘design’ has some higher value or lofty purpose. It is just to say that, fundamentally, design is about what works.

Some designers have a knack of making things look beautiful and tidy; like it was obviously supposed to be like that. This ability to synthesise, organise, colour-code and collate belies the reality of an experience that is not always straightforward, obvious or elegant. The now ubiquitous ‘double diamond’ is a case in point: a helpfully innocuous way to describe a design process. The simple symmetry of the two up-ended boxes suggests not venturing outside so much as just setting them on edge slightly.

The reality of the design process is that it is challenging. It means looking at things anew, challenging the status quo, venturing outside of the comfort zone and being open to new possibilities.

Better by Design was an experiment, funded by Big Lottery Scotland to explore the potential of design to support third sector organisations in becoming more sustainable and increasing their social impact. The results were impressive.

This book introduces the methods and mindsets from Better by Design. If you’re new to design, I hope this book inspires you. If you were part of Better by Design, I hope this both brings back memories and encourages you on your journey from here.
Getting Started

Working in context, alongside the people at the frontline and with those they serve, design has the potential to be transformational. But where – and how – to start? The design process is loopy, not linear, and it explicitly asks people to explore what they don’t know and unlearn what they do. However, organisational cultures rarely reward naivety or celebrate the discovery of what doesn’t work. In order to get started, we need a good dose of optimism, an injection of courage, and the tenacity to get others on board.
At a time when the Scottish voluntary sector is facing unprecedented challenges, what can the world of design offer? Design is often talked about in terms of the latest fashions or gadgets. However, over the last 20 years or so people from other fields, starting with business and growing to include the healthcare, education and voluntary sectors, have begun to look at how designers’ thinking and methods can effectively change systems.

Better by Design was an initiative funded by Big Lottery Scotland, that introduced the mindset and methods of design to support Scottish voluntary sector organisations to design new ways of working with and for people in the context of the communities in which they live.

The design process aligns well with other asset-based approaches. It builds on what is good and draws upon the knowledge, skills and experiences of the people who use and deliver services to create new ways of working.

Neil Cross, Professor of Design Studies at the Open University described the way designers think as “constructive discontent”: designers have a relentless curiosity to understand any given situation from many perspectives, coupled with a restless belief in the potential to make life better by working with the people involved. It is a mindset that we often find amongst people delivering services, but they often lack the time or tools to develop their ideas into new ways of working.

A design approach offers simple frameworks to help people find problems and map them out in ways that are sharable and reveal patterns, connections and opportunities for change. These tools and methods help stakeholders to gain fresh insights and develop new perspectives on unmet needs and the services they currently offer. New perspectives are vital if we are to change behaviours, develop new relationships and support change across the system of service delivery.

In Better by Design we described the stages of the design process as insight, inspiration, innovation and implementation but it’s important to recognise the process is not linear but loopy, iterating through phases of divergent exploration and synthesis of ideas.

The insight phase is one of exploration and discovery, using tools such as research, customer journey mapping, stakeholder mapping and the organisational health scorecard. It is expansive, discovering the experiences and views of staff, communities, people who use services, trustees, volunteers, funders and others.

Through inspiration we look at different possibilities and ideas for change arising from insight. We explore 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.

While innovating, organisations will 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. We also explore the business models needed to underpin the effective working of the organisation.

Finally, implementation is when changes and services are consolidated and launched, business models pinned down and evaluation and engagement firmed up.

Experience has taught us that to embed new services and create sustainable organisations new ways of working are often necessary. Design has much to offer culture change. It encourages a sense of inquiry and an open mind, focuses attention on the needs of those who use services and brings an optimism and enthusiasm for continuous improvement.

While we’re not suggesting that everyone who took part in Better by Design became a designer, but the process showed that anyone can use the tools and methods that design offers and that the design process can help to develop a culture that engages people who use services and people who deliver them, collaboratively, to make a difference.
Perhaps you’ve identified a specific challenge that you want to address with a design approach, or maybe you just have a niggling feeling that things could be better; in either case, to get started you will have to invite colleagues and others to get on board and join you.

A design approach thrives on the input of a range of different perspectives so you may be inviting people who rarely, if ever, work together to take part. And take part in what? Well, you don’t know what the output of the process will be, because you haven’t started yet, and you do know it will most likely take people out of their comfort zone and might identify problems with the current service provision that haven’t been noticed or discussed until now.

It can be tricky to introduce design into a culture that is more comfortable, or familiar, with traditional project management approaches, where the solution is decided at the outset and the joint effort is towards implementation within a certain timescale. In such an environment, where the drive is towards solutions, the iterative and exploratory nature of the design-led process can feel confusing and frustrating. You will need to muster all your leadership and stewardship skills.

The analogy of a creative roller coaster had resonance with those taking part in Better by Design. It captured the feeling of getting people on board and then plunging into the unknown before coming back up the other side having developed something genuinely new (whether a new product, service or new networks) while also going through a parallel learning process.

Fortunately, most human beings have a degree of natural curiosity. Design is a process of collaborative inquiry, a quest to find new and better ways to make a difference. And quests start with questions.

Framing the question that you wish to invite others to join you in answering, through the design process, is the first step in getting people on board. Good questions have a future focus, they are framed in human terms, they are broad enough to allow you to take you to unexplored areas but narrow enough to feel manageable. This question will provide a reference point throughout the process, attract people to take part and can be developed into specific design challenges as you progress. Coming up with a good question can take some time . . .

As with any quest, there is a hint of danger. For some, this adds excitement. For others it can make joining the initiative sound like a career limiting move. As the steward of this process, it is your responsibility to ensure the safety of those taking part. We take this point very seriously and the physician’s law, first do no harm, should be attended to in every element of your work. For your team of co-designers, this means recognising that the culture may not be welcoming of inquiry and critique and ensuring that you provide a safe space for people to learn and work together.

You should seek and obtain explicit permission from executive leadership and your board to begin the design process. The process relies on finding things that could be better. By implication you may find things that are not good enough. By gaining leaders’ active support, you and your co-designers will be enabled and encouraged to explore deeply, to challenge current ways of working and ultimately to make a difference to the lives of those you’re here to support.
Who are the right people to initiate and sustain change in an organisation? How do you find them? How do you get them together as a group? If the objective is to make change happen, is it okay (or perhaps even counter-intuitive) to use a group that already exists in the organisation?

These are some of the dilemmas that organisations face when they are thinking about change. And to call these ‘dilemmas’ is not overstating it. When organisations are busy, delivering products or services that demand capacity and attention, things work according to systems and procedures. Staff are trained in their respective responsibilities and stuff gets done according to a plan. Plans are the things that organisations use to control things... and when you're up against it, the ability to control what's being done is invariably of high value.

But what happens when things need to change? What happens when the planned stuff isn't working? Sometimes organisations get ‘stuck’ in a culture of planning and control, a culture within which changing things becomes difficult or ‘sticky’. That’s where a ‘change team’ might come in handy...

Forming a change team is, on the face of it, a relatively simple process. And yet, like all those things that appear simple at first, it can get messy. In essence, forming a change team is nothing more complicated than inviting people, who you suspect might be interested in engaging in a process of change, to join that process. Just take a moment to sit back and reflect on what that might look like in your organisation. Could the mere act of inviting people to take part in creating change in an organisation possibly cause any problems?

The answer is, yes, of course it could! For many organisations, and in particular the people that work in organisations, the prospect of change is usually unsettling and sometimes frightening. Bringing a new group of people together with the intent to create change will also create ripples of unsettlement across an organisation. Some of the people who get invited will wonder why they are being asked to get involved. Some will not want to get involved, and some others will feel disappointed that they weren’t asked to get involved in the first place! How do you get started?

We think that the best way to get started is just to start... The formation of a ‘change team’ will act to create a new network in an organisation. New networks are fundamental catalysts in the change process, because they learn. The change team represents a new gathering of people in the organisation and it will act as a ‘strange attractor’, to use a term from complexity theory. In ‘sticky’ organisational cultures, groups meet to make and review plans... Plans that are made to control things. This can be a challenging environment in which to initiate real change. People in new networks begin to learn from each other from the moment they meet... and they continue to ‘learn their way forward’ as they go.

Finally, one of the great things about a change team is that it will change! Over time, the size and composition will vary, according to how deeply involved the organisation is in the process and what themes or ideas are being worked on. So, it doesn’t pay to worry too much about who’s part of it to begin with. Cast your net wide. Invite people you think will be interested, from wherever they may sit in the organisation. Once people are on board and word starts to spread about what the change team are talking about and doing... people will come!
Design is a social process and involves working creatively and collaboratively. As you get started, it’s worth giving some thought to how and where you and your colleagues will work together. The setting and way of working that you enable and inspire will be important in creating a safe space for experimentation and learning.

For designers, home base is the studio. It’s a safe place to reflect, collaborate, make, experiment, play and learn. Few organisations outside of design have the luxury of their own studio so instead we have to pay attention to fostering an environment and way of working when we get together throughout the design process in whatever meeting room, community hall or borrowed space we can find. In this way we can simulate a studio-style of working anywhere.

So, what are the characteristics of studio working? Studios are safe and creative spaces to work together that facilitate creativity and learning. You might expect to see lots of pictures, post-its and flip charts on the walls, piles of Sharpies and the occasional interesting ‘thing’ to spark conversation or inspire thinking. Studios are generally messy places where it’s okay to scribble and sketch then rip it up and start again. The bins are often full.

The space is open to encourage people to move around step in to the see the detail and out to see the big picture. There is space around the edges but desks are for working at; designers converse and collaborate without a line of wooden defences between them.

Unlike our office desks where we work alone, perhaps typing and perfecting reports prior to circulation, in the studio our work is out there and visible from an early stage and all through the process. This can seem risky and can make people feel vulnerable so it is vital to foster trust and encourage honest, respectful critique.

Studio style working has a different style of discussion. You’ll hear open-ended questions, and you’ll see real, active listening. Learning in the studio is based on dialogue and, with practice, you will notice that there is a different quality to the conversations between your co-designers as you progress.

The studio is an analogy for the culture that design approaches promote in your organisation. Attending to the environment, listening and sharing ideas openly and honestly, providing materials and opportunities for drawing, making and playing all help to create the conditions for a creative and productive process.
Indispensable tools

The rise in interest in social design over the past decade has led to a rash of toolkits, many of which have been developed with substantial investment and in-depth research into what works in different settings. We haven’t attempted to replicate, or even less improve upon, these toolkits here. Instead we’ve included a list of some of the toolkits we particularly like. Have a look, have a play and develop the tools in anyway that works for you.

Nesta’s DIY Toolkit
Nesta’s DIY Toolkit, Design, Impact and You (2014) Funded by Rockefeller Foundation and designed for development practitioners to invent, develop or adapt ideas that can deliver better results. It draws on a study of many hundreds of tools currently being used and includes only the ones which practitioners found most useful. Many of them are well documented and have been widely used in other sectors. All the tool descriptions include a key reference, so it is easy to trace back their origins and dive deeper into other publications about their application. http://dytoolkit.org/

The Social Innovation Lab
An old one but a good one - The Social Innovation Lab for Kent Method Deck (2007) (SILK) created by UK consultancy Engine as part of their work for Kent County Council was an early attempt to materialise and make more widely available to relevant professionals and local residents a design-based approach to designing public services. http://socialinnovation.typepad.com/silk/silk-method-deck.html

The IDEO Human Centred Design Toolkit
The IDEO Human Centred Design Toolkit (2009) commissioned by the Bill and Melina Gates Foundation sought to provide NGOs and social enterprises with the tools to understand a community’s needs in new ways, find innovative solutions to meet those needs, and deliver solutions with financial sustainability in mind. It is one of the most widely cited and linked social design resources. http://www.ideo.com/work/human-centered-design-toolkit/

The IDEO Field Guide
The IDEO Field Guide to Human-Centered Design sets out IDEO’s process with the key mindsets that underpin how and why they think about design for the social sector, includes clear-to-use design methods for new and experienced practitioners, and case studies of human-centered design in action. http://www.ideo.org

EBD Toolkit
The NHS Institute for Improvement and Innovation Experience-based Design (EBD) toolkit (2009) is a way to bring patients and staff together to share the role of improving care and re-designing healthcare services. http://www.institute.nhs.uk/quality_and_value/experienced_based_design/ke_alapproach_experience_based_design.html

The Design Against Crime research centre
The Design Against Crime research centre at Central Saint Martins, University of the Arts, London, describes its methodology for bringing a design-based approach to tackling crime with a focus on user/misuser and abuser driven innovation (2010). http://www.designagainstcrime.com/methodology-resources/design-methodology/list-and-description

The Design with Intent toolkit

Nesta’s Develop Your Skills
Nesta’s Develop Your Skills (updated regularly), presents tools, reports and resources organized around seven stages of innovation. http://www.nesta.org.uk/develop-your-skills

The Design Council’s A&E Toolkit
The Design Council’s Accident and Emergency (A&E) Toolkit (2011) is for NHS managers, clinicians and designer and healthcare planners who want to develop and deliver a better service in effective and inspiring environments. It aims to help people understand how to use design to develop integrated quality improvement plans and improve performance against A&E clinical quality indicators. http://www.designcouncil.org.uk/A&EToolkit/

MindLab
The Danish Government’s cross-ministerial innovation unit MindLab has published its Methods Cards. It uses methodologies anchored in design-centred thinking, qualitative research and policy development, with the aim of including the reality experienced by both the public and businesses into the development of new public-sector solutions. http://www.mind-lab.dk/en/methods

The Australian Centre for Social Innovation

The Frog Collective Action Toolkit
The Frog Collective Action Toolkit (2012). This is a package of resources and activities that enable groups of people anywhere to organise, build trust, and collaboratively create solutions for problems impacting their community. http://www.frogdesign.com/work/frog-collective-action-toolkit.html

The Social Design Methods Menu
The Social Design Methods Menu (2012) by Lucy Kimbell and Joe Julier summarises 11 methods used with both social entrepreneurs and MBA students, and suggests how to combine them into some recipes. http://www.lucykimbell.com/all/Fieldstudio_SocialDesignMethodsMenu.pdf
Better by Design we’ve drawn on a wide range of tools and methods from design but also from other disciplines including leadership development, change practice, action research, social research, economics, innovation, and post-conflict stabilisation and peace building, depending on what seemed to work at the time. It truly is a multidisciplinary approach.

We’ve illustrated a number of the tools that have had most traction across the process in this book but would encourage you to delve in and find out more from the vast array of sources available.

However, there is one toolkit that we couldn’t do without. For the past two years we’ve travelled the length of Scotland with a large plastic box containing the vital tools of our trade: Post-its, Sharpies, and peg people. While it’s easy to be disparaging about the omnipresent, they really do help people to capture, move around and share insights and learning in a visual way with the rest of the group.

We recommend you bring together your own ‘toolkit’ to help facilitate and visualise the design process. Here are a few things you might like to include:

- Sets of Post-its in a range of sizes, colours and shapes
- Sharpie marker pens in a range of colours. They are the king of marker pens but can leak through flimsy paper onto surfaces, so take care!
- Crayons. For when using flimsy paper
- Flip chart paper – the self-sticking version for special occasions
- Magic whiteboard
- Peg people for prototyping and illustrating services
- Pipe cleaners
- Scissors
- Blu-Tac and White-Tac for precious walls
- Play-doh
- Pom-poms
- Googly eyes
- A working and fully charged digital camera comes in handy too.
A few of us were still a bit nervous when we turned up for the first meeting of our new change team. Perhaps nervous isn’t the right word for everyone around the table, but I don’t think anyone was sure of what to expect! We had all had been to at least one meeting or workshop and had experienced how the Better by Design team were encouraging us to work. But it’s always difficult to overcome that slightly depressing feeling of anxiety when faced with a pile of ‘post-its’, some sharpies and a very blank, very big wall. Oh dear . . . how are we going to fill this?

I think everyone gets that feeling, but from what I experienced, it didn’t take long for us to warm up. Dare I say it, I think the team rose well to the challenge! The change team at CARF came from all corners of the organisation and I like to think that we’re a diverse bunch when it comes to our thinking. I knew at the start of this journey that it was about getting everyone involved, so I’m glad to see how people from right across CARF got engaged with the work.

There’s never enough time in a busy job and giving time up to go and think about the future can bring with it some feelings of guilt! But I’m seeing a change in people’s attitudes through the eyes of the change team. I think we’re getting more comfortable with all of it . . . getting a better grasp of the design context, seeing it as an iterative process and becoming more confident in using the new tools. I think there’s also a general realisation that, if we want to get to where we want to be in the future, we’ve got to do the work!

I know there are strong characters in CARF’s change team, and as they adapted to their new ‘freedom’ to work together in this way, they very quickly saw their ability to represent the whole organisation in influencing the future. There is a bit of buzz around the work we’ve been doing since and there have been a few ‘quick fixes’ to talk about already. For me, that’s good, because I sense there are many changes ahead of CARF, so getting started on them early makes sense!

Norma Philpott talks about CARF’s Change Team
Design is often described as an approach to problems solving but perhaps one of the most useful aspects of design is that it is an approach to problem finding. Design is particularly suited to the messy, or wicked, problems that the majority of those in the social sector concern themselves with. The methods encourage exploration of the bigger picture - the real life challenges, the organisational processes and cultures and the major trends driving change in the world around us – and then help to identify patterns and opportunities to make a difference.
Empathy

In the early stages of the design process we aim to walk around, sometimes quite literally, in the footsteps of the people we serve, observing them in their own context and trying to get under the skin of their real-life experiences. We are working to understand and be sensitive to their feelings and thoughts and develop insights that can be turned into opportunities for improvement.

Tim Brown of world-leading design agency IDEO, describes this approach as ‘design empathy’. He suggests that when organisations develop empathy as a ‘mental habit’ and a ‘cultural value’, they allow a deep emotional understanding of their clients to inspire their work. This unlocks creative capacity for innovation and has the potential to transform individuals, teams and organisations at large.

Empathy is fundamental to the Better by Design approach and more widely, empathetic design has proven useful in addressing complex, systemic challenges in many diverse fields such as healthcare and education as well as in enabling organisational change. As such, the principles and mindsets of Better by Design apply at an individual, service, project, organisational and system level in order to enable a human, empathetic and creative approach to change.

Engaging our human nature and developing empathy is an important skill in the increasingly complex environments in which we live and work. Research shows than when we are empathetic there are changes in our cognition, enhancing our ability to receive and process information and improving our ability to perceive patterns in complex data. Empathy helps us to pick up subtle clues from the environment and allows us to make sense of how things and people relate to one another. From this we can begin to sense opportunities for improvement through addressing unspoken needs or finding new ways to relate and organise.

This is not to say that the design process is all fluffy and emotional. It is about valuing the insights that come from empathising with an experience and balancing this with analysis of the factors behind that experience. As Tim Brown puts it, it is about ‘thinking and feeling, rigorously and deeply’.

The good news is that most people have the capacity to empathise. The bad news is that prevalent organisational cultures of expertise, evidence base, status, high levels of stress and risk aversion can suppress interest in and application of compassion.

Through Better by Design we have worked to develop a healthy balance of empathy and analysis and for many this has led to higher levels of engagement and a reconnection with the purpose and values of their organisations. We’ve used a range of techniques, tools and methods to get to know people, to reflect on how experiences make us feel and to draw valuable insights from this.

Getting to know people, not just people who use services but their families and friends and our colleagues and partners in the wider system, has many positive consequences. Empathy breeds empathy and working mindfully in this way has developed deeper and more effective collaborations. Being open to feelings has encouraged curiosity and an enthusiasm for learning not just what but why. Taking time to engage with and understand people who use our services has revealed that sometimes little changes can make a big difference to the people we seek to support because, after all, they are the experts in their own lives.

Cultivating empathy as a cultural value and extending it towards our wider stakeholders requires effort and sustained effort. It can be easy to snap back to more one-dimensional approaches in times of stress. However, through the course of Better by Design we’ve found that the effort pays off.
Research in the design process

Do-it-yourself research brings rich insights and light bulb moments.

In the early stages of the design process, the focus is on getting to know people, developing a sense of empathy and a deeper understanding of the context and communities in which people exist. The emphasis here is on insight more so than evidence base, and it’s ok to pursue an idea that may have come to light from a single comment or conversation. You will have the opportunity to test your ideas later on as you begin to visualize them and develop prototypes.

Design is most successful when you really try to understand people not just on an intellectual level but also on a human level. This means finding ways to share their experiences and understand their lives in context and in the moment. Most often, it’s these rich experiences of empathizing with people that bring the ‘light bulb moments’, the insights into creative opportunities that drive the design process.

The exploratory, qualitative research necessary to gain an understanding of people’s underlying motivations, opinions and reasoning can take a wide range of forms, from the infamous focus group to individual or ‘paired’ interviews, observation, workshops, diary keeping, photo essays and much more besides. It also incorporates ethnographic research, an exploratory and unstructured approach, combining participant observation with immersion in the lives of the people you wish to understand.

Of course ‘research’ is a specialist subject and there are times where you may want to commission a specialist to undertake research on your behalf, perhaps to gather independent evidence of the impact your service is having on the outcomes you are aiming to achieve. However, in the early stages of the design process, there is a lot to be said for D.I.Y. and engaging with people and really listening is vital in developing empathy as a mental habit and cultural value.

To get started, it’s helpful to think through what you want to learn more about, how to go about gathering insights and then set out a broad plan. There’s a balance to strike between obtaining relevant information and engaging the person you’re working with in the process and encouraging them to be thoughtful and creative. It’s an art, not a science, and it gets easier with practice.

The most straightforward form of research is a conversation. To help ease into the discussion and put the other person at ease, you might think of some questions in advance. Having a detailed list and working through them can make the whole thing feel a bit stilted and one-sided so we prefer to keep the questions quite broad. The O.R.I.D framework is a helpful guide. Start with ‘Objective’ questions. These are the straightforward, easy to answer, factual questions like, “How many people are there in your household?” These questions help to put both the interviewer and interviewed at ease.

As you develop a rapport you will move into ‘Reflective’ questions. These go a bit deeper and ask the person interviewed to reflect upon how they feel about a situation or experience. These questions bring up images, feelings, memories and associations. “How did you feel when you were waiting for the receptionist to come off her phone?”

‘Interpretive’ questions explore how people make sense of things and what meaning they attached to them. They ask the person to think about implications and significance of an event. Interpretive questions might ask “So, what did that mean to you?” or “what if . . . ?” Decisional questions open up a space for the person interviewing to offer up opportunities for change. Having taken the person you are interviewing through a reflective process, decisional questions might ask, “What changes would have made the experience better for you?”

Listening to everyday conversations you’ll hear that people naturally loop through these types of questions and as you practice this in your own research it will become natural to loop through the cycle a number of times in any discussion.

Talking with people underpins much social research but there are many other creative ways to go about gathering information. You might engage communities or people who currently use your service to gather insights from their own perspectives or through talking with one another. You could ask people to keep a diary of their day and share this with you or perhaps give them a camera or ask them to record specific events on their mobile phone and share the pictures with you. Done well, this can be a hugely insightful and empowering process.

Undertaking your own research is engaging, inspiring and brings a grounded richness to your insight gathering. However, social design is about creativity and responsibility. Before undertaking your own research, consider the ethics and ensure that you explain what you are doing and why to the people you engage with. Make sure they understand and are happy to consent to take part.
The Three Horizons

The Three Horizons model, developed by the International Futures Forum, has been popular and useful in exploring the wider context and prompting conversations about transformative innovation. It is helpful both in workshops and also as a framework for deeper analysis. It has a welcome coherence and through the Better by Design process, ‘red curve – green curve’ became a shared language to describe the journey from the here and now to a desirable future world.

The Three Horizons model bridges the gap between forecasting trends and drivers of change based on plausible and coherent scenarios and developing a vision of the future. With a vision of the future in the third horizon, based upon desirable values, the model supports discussion of the pathways to take to create that future. In this sense, the framework is helpful in engaging groups of people to think about long-term social change.

The model itself is simple and familiar. The first horizon - H1 - represents the dominant business model at present. Maintaining Horizon 1, or ‘keeping the lights on’, is necessary to ensure continued delivery but the current model will necessarily become less effective over time. Aspects of business as usual begin to feel as though they are no longer fit for purpose and we start to look for new ways of doing things.

Innovation begins as the shortcomings of the first horizon system become apparent. This forms a second horizon - H2. At some point the innovations become more effective than the original system. This is a point of disruption where H1 and H3 collide. We have come call this ‘The Crazy Zone’ and during this phase there is a great deal of uncertainty. Should you protect your core business that is on the wane or invest in the innovation that looks as if it might replace it? Clashes of values are common where people propose different views of the future and the paths to get there.

Meanwhile, there are other innovations happening on the sidelines that to most people look way off beam. This is fringe activity. It feels like it is a long way from H1, based on fundamentally different premises. This is the third horizon - H3. It is the long-term successor to business as usual; radical innovation that introduces completely new ways of doing things.

Three Horizons offers a simple and effective way in to exploring the wider context in which we operate while encouraging a sense of optimism – we can play with alternative and desirable futures and work together to create the journey towards it. There is no either or. All three horizons are present at the same time. We need to ‘keep the lights on’ today, and think about how to keep them on a generation from now in very different circumstances. IFF calls this the gentle art of ‘redesigning the plane whilst flying it’.

Using the model as a reference point, working with three Horizons enables creative discussions about:

- The current business model and what impacts upon and challenges its sustainability into the future?
- What does the desirable future look like? What are the elements of the ideal system and what early seeds of it can we see in the present that can encourage us?
- There can be tensions between the current reality and the vision of the future. Some innovations might prolong the status quo while others might support progress towards the vision of the future. Which are which?
- We need to address the challenges in the current system. This buys our ticket to the future. At the same time, it’s important to foster the seeds of the future, third horizon. How can we best hold this tension and lead change towards the future?

We have used the three Horizons model in many settings and our observations align with those of our friends at the IFF. Traditionally, most policy making and discussions about policy occurs in the first horizon. It is about fixing the failing system, innovating in order to maintain it, ‘keeping the lights on’. The extended model of the three horizons opens up a new policy domain for most people: second horizon policy making underpinned by third horizon aspirations.

In the context of the design process, the Three Horizon model opens up a space for optimistic innovation that aligns with the values of the individuals and organisations taking part. It is a useful reference point and reminder of the possibilities that emerge from working together for social change.
Throughout the design process we flip our field of vision from close in, miniature details of how people live their lives, how they interact with other people and things, out to the very big picture of the trends and issues that shape the wider world around us.

Looking at the big picture keeps us focused on the future and alert to changes that might impact upon people who use our services or impact upon the sustainability of our organisations. These changes can provide a focus and a prompt for designing a new service or a new approach.

Given the uncertainty and complexity of the world we live in, it’s highly likely that people will have different views about what is happening in the world and the impact these trends will have. By working together in a group, it’s possible to see things from different perspectives and to explore together what trends are important and why. Through the discussion, it’s helpful to highlight where there are areas of consensus, where there is disagreement and where there is a sense of opportunity or possibility.

A simple table, sketched on a large piece of paper or using post-its on a wall, helps to visualize the outputs from the discussion.

Along the bottom, draw a timeline to represent a time period you are considering, for example, you might chose to look forward for 3, 5 or maybe 20 years. Down the left, it is helpful to group trends according to themes, for example Political, Economic, Social, Technological, Legal and Environmental change. However, you might chose to highlight themes that are specific to your area of interest, for example, health or immigration.

Using post-its, members of the group take a few minutes to write down what they can imagine seeing under each of these themes in the future. They might jot down ideas, products or services, events or other examples of how life would be different. As people share their ideas with the group, the grid is populated and a discussion develops. Perhaps some people see some challenges as further in the future than others. Maybe one person sees an opportunity where others see a threat. As the discussion progresses, patterns emerge and it becomes clear where there is energy – in the form of active agreement or disagreement – to explore the potential for innovation.
Real Life Stories

Service user, customer, client – there are various ways to describe the people we support but none of them sit particularly comfortably. ‘Real life stories’ are short and provocative vignettes that aim to develop an empathetic and curious mindset. By developing these stories and characters, based on the experiences of people you have met and spent time with, you can give your imaginary ‘service users’ a name and start thinking of them as real, individual people.

Real life stories are ‘archetypes’, not stereotypes. They build are descriptions of particular characteristics or patterns across different people. We recognise that every person is unique, and has their own strengths and challenges. However, by working in this way, we are able to build on the experiences and knowledge of frontline staff and researchers, while respecting individual confidentiality. Real life stories provide a start point and by combining them with another tool, ‘empathy maps’, it’s possible to create rich stories based on an amalgam of experiences.

Empathy maps help to develop and visualize a more holistic view of the people who use or may use your services, bringing together ideas about what they might think, feel, say and do in their everyday lives. Using a simple template, it’s possible to develop and share ideas and explore any assumptions that you might make. At first this process can feel difficult and sometimes people feel uneasy about making assumptions about other people’s lives. It’s important to remember that this is intended to be a creative process, and there is no right or wrong. With practice the process is useful and insightful, and can help you to notice, amongst other things, the impact organisations can have on individuals and the importance of listening to customers / users.

By getting into an empathetic and curious mindset, you can begin to identify ‘pain points’ in current service provision but also look beyond the present and begin to sense creative possibilities for new services.

Callum is 15 years old. He has an unsettled family life. Callum has never met his Dad. He lives with his mum but sometimes when he needs to get out he stays with his gran. There has been a few men in his mum’s life but none that have got to know Callum. He’s not bothered. Callums pastoral care teacher has become concerned. Up until now Callum hasn’t come to her attention - he wasn’t any trouble. But recently his attendance has been erratic. Callum is also becoming a familiar face to the local police – he has been hanging out with known gang members and getting involved in low-level criminal damage. In the last two weeks, Callum has spent eight nights away from his home but he hasn’t been at his gran’s house.
Building Your Own Real Life Stories

If you would like to experiment with these techniques, there are a number of Real Life Stories available to download on the www.gettingbetterbydesign.com website. You may like to develop your own stories to illustrate the particular challenges you are working with. You’ll need:

- Real life story cards (download and print or develop your own)
- Flip chart paper
- Coloured pens.

1. Work in small groups – 2 or 3 people works well.

2. Pick a card that appeals to you and read the story on the front. Share it around the group.

3. Spend a few minutes individually, thinking about the person and placing yourself in their shoes. This is about thinking creatively with a mindset of building empathy and immersing yourself in daily lives.

4. As a group work build up a rich story of your character and their life. Imagine what this person thinks about. What do they see and hear around them? How do they spend their time? What objects or things are important to them? What do they hear from other people and from people in authority? How do they express themselves? What sort of thing can you imagine them saying? What are their hopes and dreams? What are their fears and challenges? Write the story on the flip chart. Draw pictures to illustrate your story. Spend about half an hour on this.

5. Reflect on your character’s story. Thinking about your services, what works well for them? What doesn’t work so well? What problems might they face and what might be unmet needs? Can you think creatively and sense new possibilities?
You might think that getting to know your own organisation is the easy bit, but how often do you really take time to take stock of how you are doing in a structured way?

As part of Better by Design we worked with the Young Foundation’s proprietary framework, the Organisational Health Scorecard (OHS) to support organisations to explore their operations in depth. The tool provides the space and structure for teams to think about, discuss and debate different aspects of their organisation and its work, and to come to a shared sense of where fruitful areas for improvement and innovation lie.

Using the Scorecard in the early stages of the design process helps to identify potential areas on which to focus design work. It also helps to create a baseline against which you can consider later on how far you’ve come. The OHS helps to engage people from right across the organisation so the design approach and areas of focus are decided in agreement with people from all levels.

The scorecard is divided into four parts: leadership, social impact, financial sustainability and delivery. For each of the quadrants there are prompt questions to help organisations consider what level they may be at. By looking at the prompt questions and considering how they apply to your organisation, teams agree a score of between 1 – doing ok – and 5 – doing excellent. These scores are plotted on a spidergram to provide a visual output and an accompanying narrative is produced from a facilitated discussion about the OHS.

The OHS breaks down the main components of performance into sub-sections and proposes aspirational statements under each heading. If the statement applies to your organisation, you’re doing excellent! If not, then by working through the prompt questions you can start to develop your pathway to greatness.

The aspirational descriptions are set out here. Have a look and think about how they apply to your organisation. If you’re not quite there yet, why not download the full question set, get a group of colleagues together and get started.

Organisational Health Scorecard

**Leadership**

The organisation has the vision, capacity, capability and confidence to deliver. It is influential and well thought of. Staff are highly engaged and quality paramount. It is well managed and governed.

Board and Trustees

A clearly articulated and inspirational vision – a forward plan and a strategy for realising that plan.

CEO and team

The skill, experience and entrepreneurship to deliver the vision and influence more widely.

Operating systems

A clear governance and organisational structure with appropriate scheme of delegation social impact.

**Social Impact**

The organisation delivers better outcomes for the communities it works with and for. It knows and engages effectively with these communities and has robust systems in place for learning and customer feedback.

**Services**

Clearly defined and co-produced products or services, with good understanding of customers / clients and competitors.

**Financial Sustainability**

The organisation has a clear business plan, with compelling business models and defined income streams. The financial position allows for development and there is capacity and capability to take on new services.

**Value for money**

Provides excellent value for money in line with social outcomes.

**Business plan and finances**

A clear and ambitious plan for delivery with diverse income streams and new opportunities identified.

**Risk mitigation**

Clear identification and management of organisational and contextual risks.

**Delivery**

The organisation clearly understands the rationale for all its work and has a strong track record. Relationships with partners are well developed. Processes are in place for capturing and acting on learning and feedback.

Partnerships

Works with partners for influencing and service delivery.

Infrastructure

Appropriate policies, processes and procedures in place for learning and customer feedback.

**Outcomes focus**

Knowledge of and ability to articulate and evidence the difference made to individuals and communities financial sustainability.

**Business plan and finances**

A clear and ambitious plan for delivery with diverse income streams and new opportunities identified.
Mapping your Customers’ Journeys

A journey map is a way of telling the story of how people use and experience services from the moment they become aware of you, to speaking to one of your team, to receiving a service, to perhaps recommending you to someone else, or maybe even becoming a volunteer. In the social sector the process of service delivery can be complex, often taking place over a long period and in many cases involving interactions with other services delivered by partners. Customer journeys are useful tools to help map out this interaction as they look through the eyes of the people you are here to help. It looks at what they are doing at each moment, and also how they feel. From this you can identify ‘pain-points’ – interactions where they are experiencing difficulty or frustration and ‘moments of truth’ – the critical points where activities or initiatives are most likely to succeed or fail.

Journey maps help to make that leap from internal thinking about processes and functions of an organisation and into the mindset of a customer. The approach can be expanded from an individual service or component of a service to the journey a person takes through a stage of their life, interacting with a number of services within a whole system. This makes it a useful tool for engaging with teams and partners to better understand opportunities for collaboration with the person’s needs in mind.

Why might it be useful?

Working in organisations, it can be easy to get into the habit of thinking about a service as a series of transactions, with policies, systems and processes to follow and forms to fill in, and forget about the human experience of travelling through your service. Viewing services through an organisational lens can mean that they are unconsciously developed to make things easier for the organisation rather than the person using the service.

By starting from the customer perspective and mapping out how people interact with a service at each stage, it’s possible to have an overview of your relationship with a person over time and think about their changing needs in a holistic and joined up way. A journey map puts the person using the service centre stage. It enables you to break down the person’s journey into smaller chunks, phases, moments and interactions. Its can also help you to compare the experiences of different groups of people. Not everyone will have the same points of difficulty when interacting with services, and so it’s important to map out several different journeys.

Creating a map of a customer’s experience is a good place to start conversations with other teams and partners, taking a whole system view of opportunities to collaborate in order to make improvements.

How do you create a journey map?

First of all, start by thinking about what you want to achieve by mapping the journey. Are you hoping to identify ways to improve a current service, or are you looking for opportunities to innovate and develop something new?

You will have done some research – observing people in real time, gathering stories from people using and delivering the service, finding patterns, commonalities and differences. For the journey map to be useful you will need to focus on the journey of one individual. You might start by mapping a real life journey of a person you have spoken with. Alternatively, you can bring together the insights you have gathered, identify interesting patterns and create a ‘persona’. A persona is an archetype, an imaginary character that represents a pattern of characteristics and experiences of a number of people.

Having identified a person, for now we’ll call him Jim, gather together a group with a range of experiences of the service or theme you are exploring. You might start with a service or project team, or you might engage partners with an interest in the same client group.

By putting yourselves in Jim’s shoes, walk through the journey, identifying where he interacts with services and considering how he might feel, what he might find tricky. Map out his experience step by step – what is he doing, thinking and feeling at each step? Identify points of interaction between Jim and the organisation and what he uses to do this eg: a poster, a website, face to face contact.
It’s useful to identify distinct stages of the journey. Typically these stages are:

Aware – How does Jim become aware of the service? Perhaps he is referred by another agency, maybe he passed by your building and dropped in. Perhaps a friend has recommended your service or he found you through a Google search.

Join – How does the Jim join your service? Is there an application form or an assessment to ensure he meet certain criteria? Perhaps he books an appointment or registers to take part in a particular session.

Use – How does Jim use the service? Does he turn up at a centre every Tuesday? Maybe he has regular sessions with a support worker agreeing his personal objectives and then checking in regularly for additional support. Maybe he uses the service only once or perhaps he continues to engage with the service over the course of a year.

Exit – How does Jim end his engagement and leave the service? It could be that he attends a fixed number of sessions and then leaves, or perhaps he leaves when he has met his objectives. Jim might even leave the service and become a volunteer for the organisation.

At each stage of the journey Jim will interact with ‘touchpoints’. These are the people and things that he deals with to navigate through his journey. These include people, forms, websites – any interaction. And at each stage of the journey he will experience different emotions. He might feel apprehensive before he joins, frustrated when he can’t make an appointment and proud when he meets his aims and leaves.

It’s common for customer journeys to be messy and to loop backwards and forwards. Not everyone will flow through a service neatly and as expected. Emotional ups and downs are to be expected and reveal opportunities for improvement and change. The journey map is a representation of how things are right now, not how they are assumed to be in process maps or policy documents and it’s more important that they are useful, rather than they look neat and tidy.

A journey map encourages conversation about how to make things better from a customer’s point of view. It helps to develop-empathy and creates a holistic view of a service or service system. The framework is flexible and can be developed to suit your own context. Aberdeen Foyer used a Customer Journey Map to tell their story of taking part in Better by Design.

As you progress through the design process, you can develop the journey map from being a picture of the as-is towards being a blueprint of how the journey will be after you have redesigned and improved it. In this way, it evolves into a useful framework to develop a shared vision for change.
Storyboarding

A storyboard is essentially an annotated comic strip. They are a really useful way to capture and communicate an idea at any stage of a project in a visual way. They are particularly helpful when you want to share your new ideas with lots of different people so that they can help to shape what you create.

People say a picture tells a thousand words, but the beauty of a picture is also that it can also be interpreted a thousand different ways. This is why they are a great tool for generating discussion and refining ideas. Through this discussion you can learn where people disagree or agree, where they are on the same page or are thinking in a completely different direction.

Using simple pictures it’s possible to communicate a lot of information concisely and help people to imagine what part they might play in this story, putting themselves in the shoes of any character in any ‘scene’.

Storyboards are supposed to be rough and sketchy, not beautiful finished pieces of art work. You don’t want to make your storyboard too perfect or people won’t feel free to change it, scribble on it and add their own thoughts and ideas. It’s the imperfections that communicate that this is a work in progress, with lots of room for development and input. You might create storyboards to help you and your team discuss a new idea, or you might use them to engage with people beyond your organisation.

When we ask people to draw, we often hear the reply, but ‘I can’t draw’. We don’t really believe that. Everyone is capable of drawing, some are just more able to draw more sophisticated pictures than others! And, as it turns out, you don’t even need to be very good at drawing at all to be good at storyboards. The main thing is for people to be able to interpret your idea. You’ll be amazed at what you can communicate through using just stick people, some arrows and a little text.

It’s often easier to leave your people on your storyboard without any faces. It’s a level of detail that you often don’t really need. However, if you feel it’s important, do it your own way. This tool is open for you to use in whatever way works best for you.

Your storyboard might tell the story of many years of a person’s life, or it could look at a service interaction in close-up detail. In either case, it helps to jot down the story in three phases, the beginning, middle and end. Once you have these points down, you can add as many pictures as you need in-between. Have a think about the stages of a user journey – aware, join, use, develop, leave. These points might help you think through order of events that you want to communicate.

Usually 6 – 9 images will be enough, depending upon how much detail you go into. Underneath your images, you can have notes that explain what is happening in each frame.

It’s up to you whether you begin with the images and annotate them as you go, or write out what is happening, and draw pictures to illustrate the text. Have a go at doing it both ways, you’ll soon get a feel for what suits you best and a quick search on Google images for ‘storyboard templates’ will bring up a variety of different templates that you can copy and play with but it’s really simple to draw out your own template and we find that just drawing on a row of Post-its is a quick and easy way of laying it out.
Exploring Food Poverty

Scarf is a vibrant social enterprise whose aim is to reduce inequalities. They used research to develop a deeper understanding of food poverty in Scotland and how it impacts people’s lives.

From the outset, Scarf was thoughtful and challenging in terms of what they wanted to get out of a research process and how it might support their journey towards being a design-led organisation; ‘What’s the point of the research?’ ‘How can we really challenge assumptions?’ ‘How can the way that we approach the research be part of our broader concern to ensure that our clients are at the heart of what we do?’

As part of the Better by Design a researcher from the advisory team undertook desk-based research to establish what was known about food poverty in Scotland and spent three days on ethnographic research with individuals and families in Aberdeen and Dundee. Their research explored the impact of food poverty on social aspects of people’s lives and how their expectations of food have changed. This provided a frame and a focus for Scarf to explore the issue on their own.

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 to give staff a chance to learn new skills and get a better understanding about their work and also to deepen their empathy for the people they are there to support.

The research revealed the insights about the social aspects of food and showed that for those experiencing poverty, food isn’t social or spontaneous thing in the way that it is for more affluent people. People shop carefully and are highly price and ‘offer’ conscious. The research showed just how little it takes to knock people who are just coping to below the ‘breadline’.

From this start point, SCARF undertook their own research to test the findings out for themselves, using some of the tools and techniques from the Better by Design ‘Insight Gathering’ workshops. They undertook secondary research online, staff-wide surveys and went out and about within communities in Aberdeen ‘standing about and talking to folk’. Their experience was insightful and encouraging and while 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.

Using the POEMS framework has helped to embed research skills amongst the staff. POEMS is a mnemonic to encourage people to work with a ‘beginners mindset’ and look anew at the ‘People, Objects, Environments, Messages and Services’ they observe. Perhaps the greatest value of the research is that Scarf did it for themselves and as a result feel that they ‘own’ the findings and have a deeper understanding of the people they support. 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.
Better By Design - Proposal

Propose

Design recognises that even the most elegant solution is never finished. Services develop and adapt in use and every interaction is an opportunity to learn and improve. Prototyping is a fundamental principle of design and it means visualising your ideas in order to test your assumptions and get closer to what works. Phrases like ‘fail cheap and fail fast’ or ‘prototype like you’re right and listen like you’re wrong’ are catchy and easy to say. However, to nurture this valuable practice, organisations must work on developing a culture that encourages honesty, make it safe to be vulnerable and promotes learning and responsible experimentation. To be vulnerable and promotes learning and responsible experimentation.
If the process of gathering insights has produced a rich harvest you might begin to find yourself feeling a bit overwhelmed. Your analysis of the insights will have broadened your understanding of problems and opportunities, but it is unlikely that the path towards a comprehensive, ‘re-design’ has really begun to emerge at this point. And if you’re feeling like it is, then be careful: it’s very tempting to rush to solutions too soon.

Developing a set of ‘design principles’ that serve to guide and support the framing of opportunities helps bridge the gap between insight and ideation. Set within an organisational context, the framing of opportunities can become a complex activity, so tools that can help unpick that complexity are of great value here, in terms of testing your understanding and generating engagement in how things might be shaping-up to change.

Start with the insights you’ve gathered and step back to look for patterns and themes. Group them together in a way that makes sense. Describe these insights in a way that acknowledges that they are based on the design research that has led to their production, but also reflects some ‘forward thinking’, pointing to potential opportunities to improve things. These short descriptions become principles to guide the next stage of your design process. For example, perhaps you have gathered a group of insights that suggest that the ways and means of communicating within an organisation are causing problems... let’s face it, this is not unheard of! So, a useful design principle that could be drawn from these insights could be, “use new ways to tell our stories.” This principle immediately opens up two big re-design opportunities; firstly, changes to the ways in which people communicate (ie. using stories), and secondly, the chance to harness a new power of storytelling.

Here’s where the complexity arises. Whilst it might appear relatively straightforward to begin to change how people communicate with each other in a single department, things begin to get a little more involved when we think about how an entire organisation communicates. And the complexity unfolds further as we begin to think about communicating with impact across entire sets of external stakeholders.

To manage this, we group the opportunities for change according to their reach and degree of complexity into three distinct levels; first, opportunities at an individual or team level; second, system opportunities that involve an entire organisation; and third, opportunities at a strategy level, invariably moving towards system change.

By organising and managing opportunities for change in this way, a ‘road map’ for change will begin to emerge. This map provides a comprehensive view of opportunities for change within and beyond the organisation, starting right down at the individual level and moving up and out through organisational transformation into entire system change.

Having framed the design principles and opportunities in this way, it’s time to take them out and share them widely. This provides an opportunity to test your findings and get more people engaged and on board with the next stage of the process.
Ah . . . I see what you mean

Better By Design - Proposal

One of the most fundamental activities of the design process is making things visual. Before everyone groans, “But I can’t draw!” visualising goes beyond sketching and includes a wide range of ways to externalise your thinking and put your ideas ‘out there’. Proposing concepts at an early stage in the design process is useful in developing your thinking and gaining feedback from people to improve and hone your ideas.

When developing an idea it is easy to focus on the elements that excite you most or those that are the most clear or straightforward, leaving aside the trickier details about how your idea will fit in the wider world. This can leave your assumptions untested and trip you up later on. Visualising your idea helps to work through how the elements of your idea fit together as a whole and how this nests into the wider system.

Having worked up your idea looked at it in front of you, you will be able to really test it, and engage others in figuring out what elements really work and what bits don’t make sense. These discussions are more productive than starting with a blank piece of paper and by probing and testing an idea that has been made visible, new and related ideas come to mind.

There are many ways of visualising ideas. Simply sketching it out is perhaps the easiest and quickest – many ideas began life sketched on a napkin! You don’t have to be an artist to roughly sketch out your idea in sufficient shape to engage others. You can practice your sketching skills by doodling and working with simple shapes to represent common themes in your particular setting. Using a consistent representation of a person, a building, a phone etc will help you to sketch out your ideas more quickly and confidently.

Making a physical representation of your idea helps people to get their hands on it and move elements around. It needn’t be perfect or beautiful, but should be functional enough to convey the main components or interactions. Play-doh, pipe-cleaners, peg people, boxes, paper and pens are all you need to build a world of possibilities. Simply the act of making ideas real, together, open up conversations about the specifics and how things might work at a detailed level.

Storyboards are scene-by-scene ‘comic strips’ that help convey how an idea flows over time. You can storyboard a whole service or a specific interaction. A combination of images and words will help to get your idea across and can become a ‘blueprint’ of a service that can be shared to guide implementation further down the line.

Role play helps you to put yourself in the customer’s shoes by acting out interactions and really sensing how the experience feels and how it works at a human level. You can use props and engage others to act out different roles and to observe the interaction from different perspectives. With practice, you and your teams can dip into short role plays at will, making this approach a powerful way to engage people in creating future services.

In Better by Design we encouraged teams to visualise ideas and put them out there at an early stage. M.A.D. sessions – Make it, Act it, Draw it – added fun and playfulness to a process that forces you to think about the details of your idea and make important choices about how you work with people to make an impact.
You’ve begun to map out the opportunities for change in front of you, so what’s the best way to find out what’s going to work, and of course, what’s not? On the face of it, testing new opportunities looks fraught with difficulties... how can an idea be tested for real without actually doing it? How do I get enough buy-in from everyone that needs to be involved? Where the heck am I going to find the time to do this... never mind everyone else?

At times like this, a good response is to start playing. Play with your ideas. And it needs to look and feel like playing, because good prototyping runs best on a wave of playfulness!

Creativity is the key component of prototyping. Your prototypes are built to represent your ideas taking shape for real. Different prototypes might represent a single stage of your idea, a group of stages, the whole thing, or even your idea as part of a new system. But no matter what form your idea takes, or precisely what it represent, you will have to make them happen as a prototype. This opens up a whole new landscape of creativity for you to explore.

For instance, you might choose to prototype the different customer journey that your new idea is aiming to produce. You will already have built some graphic representations of that new journey as you explored opportunities but to really prototype the journey, it needs to be brought to life... taken off the post-it notes and experienced through they eyes hearts and minds of those involved.

You might start by storyboarding what’s happening at different stages in your new idea. That could quickly lead to focus being drawn down to discrete parts of the journey, where some adept role-playing can help to build confidence and iron-out any misunderstanding about how this might work for real. Finally, to really get into the detail and test any remaining assumptions you or your colleagues might be carrying, you might build a scaled-down model of what this idea looks like as it takes place in the real world.

So, let’s recap what you’ve just done... first, you drew some pictures that told a story, then you (and your colleagues) channelled your experience into acting out parts of that story unfolding, and lastly, you built a working model of the place where your story takes place. Does this sound like a space for play?

It’s good thing to remember that it doesn’t matter if you get it wrong. In fact, the more you get wrong (and the quicker it happens), the quicker you’ll get to a prototype that begins to work. That’s because prototyping is all about learning... learning through doing. Just remember... keep it simple to understand, low-tech to produce and don’t be afraid to fail fast and fail often!
When PLUS was looking to redesign a service for young people, they decided to go about 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, the team at PLUS decided to ask the young people to design it themselves.

The original ‘Fixers’ project involved two groups of young people with Aspergers Syndrome developing resources that explained their condition and could be used in training. The work of both groups culminated in the creation of short DVD’s. 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 the young people 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 Aspergers; 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 groupwork 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 with the people who were going to use them taking the lead. This was a new and welcome development for them and one they feel well-resourced to continue in the future.
Design leadership is characterised by creativity with responsibility. Sustaining a design-led approach means maintaining a ‘restless discontent’, motivating others with a relentless focus on making things better. To continually develop innovative services, strategies and systems that are responsive to actual wants and needs, we must make engagement, empathy and learning a way of doing business and keep challenging ourselves to know how we make an impact.
In one sense, organisations are no more than collections or groups of people. And yet, when we’re part of an organisation we can take on behaviours, habits, and norms that we might not recognise as our own in other settings, say when we’re with family or friends.

Organisational culture is the invisible and intangible thing that shapes the patterns of behaviour within organisations and understanding these patterns is important if you are hoping to introduce something new or make a change. In organisations, especially when dealing with complex issues, it’s not uncommon to get stuck in a repeating pattern of behaviour. This can feel frustrating and emotionally draining and act as a barrier to change. Sometimes the only way to stop repeating the pattern is to take time out to notice it. To get under the skin of the culture is can be helpful to think of the organisation as a system with four levels at play at any point in time. Working through each level of the system in groups enables a discussion about what helps and what hinders change in an organisational setting. Stepping back and observing ourselves in our organisations in this way, without judgement, helps us to see things from different perspectives and provides fresh insight.

The framework works through each of the four levels and starts with small groups of between 2 and 4 people considering an organisational event and then working through the stages of the framework to describe what happens at each level in their own organisation.

**Events**

Events are just that. In the context of this framework, they are the events within a system that lead to a problem being perceived. Within an organisational setting, examples of events might be the compiling of reports that indicate a decline in performance, a supplier letting you down or someone calling in sick.

**Patterns of Behaviour**

The pattern of behaviour is what happens in response to an event. Where there are patterns they can usually be easily seen. Here it is about noticing “what is”, rather than what should be or reasons why. An example could be, for example, when there is a problem, senior managers immediately step in to take control.

**Systemic Structure**

This view considers how an organisation’s configuration can create and reinforce patterns of behaviour. So for example, if roles are not clear, this reinforces a behaviour of passing problems up the reporting line.

**Mental Models**

Mental models lie within the culture of organisations. They are the unwritten, and often unvoiced, assumptions held by people in various parts of the system that catalyse and allow patterns of behaviour to occur. Mental models could be, for example, that it’s not good to take a risk or a more positive model in an organisation could be that creativity is valued.

This technique is useful in looking at what drives a system, or organisation, to behave in a certain way. Once captured, the four levels tell a story about how an organisation can unwittingly adopt a cycle of behaviour and continue along that path without recognising the pattern. Sometimes, only when the system or organisation’s behaviour is broken down in this way and brought to the attention of those within system, can you deal with problems effectively and work together to shape the culture to enable and sustain positive change.
Engagement and Participation

Better by Design brought methods and mindsets from design to work with people who use service and people who deliver services to make them better. People are at the heart of the development and delivery of services that they want and need because they are the experts in their own lives. To sustain a design-led approach, it’s necessary to continually look for ways to effectively engage with people and encourage their participation.

We are used to hearing and using the general term ‘service-users’ when referring to those who access support, but it’s an uncomfortable term. It says little about who these individuals really are or what they might be contributing and it promotes a sense of ‘other’ – it’s them, not us.

Someone who uses a service may also be a volunteer, a campaigner, an advocate, or a mentor. As part of the Better by Design process, we worked with those taking part to think beyond ‘service-users’ and to explore the following questions:

Who really benefits from the work we do, both directly and indirectly?

In which ways do these groups of people currently get involved?

Where might there be opportunities for increasing participation and involvement?

The work looked beyond delivering service and towards how we engage with people and how they might participate in our work together. It was an opportunity to temporarily step back from the day-to-day demands of service delivery, and to think strategically about how both the needs and capabilities of the people we serve and explore the ways in which they could most effectively shape the organisation’s future activity.

What did we do? The process began with an online survey of staff, which gathered feedback about the different ways that those who benefit from the organisation are currently involved. A mixture of people who held different roles throughout the organisation were invited to take part in that we got a range of perspectives and ideas. The responses described a wide range of current opportunities for participation; from informal feedback and interaction on social media to peer support, mentoring and steering groups.

Based on this feedback, workshops were held with staff members to come together and reflect on what was already working well, and where there were opportunities for further involvement.

The workshops were structured around a simple framework for thinking about the different ways that people might get involved with something. This framework describes four categories, from observing, a low level, passive form of engagement, to Contributing, Collaborating and then Leading, a high level of active participation.

The highest levels of participation are necessarily the most superior types of involvement, it is not always appropriate to encourage all groups of people to get involved in those ways. Instead, it is important to acknowledge that it’s natural for any organisation or group to have a larger number of people who are loosely involved, and a smaller number who are very active and feel personally invested.

What’s most significant is that the whole spectrum of opportunities for people to get involved has been thought about in depth, and people have taken time to think about which groups of people these opportunities might be most appropriate for. When these opportunities are well suited, both the individual and the organisation will have a huge amount to gain.

What next? The conversation became a starting point for a range of different actions by those who were involved:

Becoming inspired by ideas for creative approaches towards engagement, based on case studies that were shared and discussion with others

Identifying a specific opportunity (related to their existing services) that staff would like to work on to encourage greater involvement (i.e. developing a peer support and mentoring system)

Developing a more consistent whole-organisation strategy towards engagement and participation (creating a framework that provides staff with guidance about the range of approaches available and when to use them).

| LEAD | Collaboration, peer-led services, social leadership & campaigning |
| CONTRIBUTE | Contributing opinions / resources, e.g. feedback, steering groups |
| OBSERVE | Receiving and consuming information, e.g. social media |
| OBSERVE | Receiving and consuming information, e.g. social media |

5958
Sustaining Impact

When applying to take part in Better by Design, a number of the organisations said they wanted to get off the hamster-wheel of chasing funding and really focus on their purpose. It’s a common feeling and where organisations have been successful in attracting funding through wide ranging bids the (often unfunded) core management task of managing and reporting on a diverse range of projects is really challenging.

Ultimately we are all concerned to make a difference, and by relentlessly focusing on understanding and increasing the impact your organisations make, you can generate more sustainable change. There is an important reframing here – sustainability is not about sustaining or growing the organisation. It is about sustaining and growing the impact your organisation makes in the world.

To help make this way of thinking a cultural habit within organisations, we’ve introduced a simple framework of questions, based on the Efficacy Framework developed by Sir Michael Barber and Saad Rizvi of Pearson. The purpose of the framework is to ensure that decisions and resource allocations are based upon a clear sense of how and whether particular projects make an identifiable and measurable impact upon outcomes. Great organisations have a clear sense of purpose and their ability to attract funding and investment depends on their ability to tell the story of the difference they make to society. The framework provides a consistent approach to reviewing, testing and developing the effectiveness of the organisation in achieving its aims.

The Impact Framework is simple and allows and encourages people to use their judgment. It asks a number of questions to help you think about the difference your organisation, project or idea will make in the world. It can also be used to look critically across a portfolio of services to help you identify which ones have most impact, which less, where there are gaps and where you might focus your development or innovation activity. By working through the questions, the Impact Framework introduces and reinforces consistent methods and a common language for reviewing and developing services that increase social impact and are sustainable.

The framework has 4 elements with suggested questions for each. These questions have worked for us but you might to add some for your particular organisation or context. The main thing is to keep asking and to ask consistently.

Outcomes
What difference do you want to make in the world and why?
Which of your organisation’s strategic objectives does this idea contribute to?
Why do you want to do this and why now?
Who will benefit from this?
What outcomes will the people who benefit from your idea experience?

Evidence
Why should we believe this will work?
What evidence of likely success can you point to?
How have you / might you engage clients in this process?
What do the people you support say about this idea?
How will you know if it’s working?

Planning and Implementation
How (when and where) do you intend to achieve the impact?
Who will lead the development?
How will you monitor progress and report results?
What other organisations or agencies will be affected by this?

Capacity to Deliver
Do you and those that your idea depends upon, have the necessary knowledge, skills and relationships to deliver the idea?
What skills or capabilities do the people you support have, or need to develop, to make this idea successful?
How will you involve people and communities?
What key partnerships are necessary for delivery?
What funding is required to deliver your idea / what is the estimated cost?

We use this framework in workshops and in one to one sessions. Participants decide on a ‘score’ based upon their own judgement on a red / amber / green scale: Red / amber and green cards are posted on the wall for each idea, project or concept. Based upon this visual signal, a composite ‘score’ for each concept or idea is then agreed by the group.

This process is visual, collaborative, constructive and action orientated and it is also simple and replicable.
When Anne Kidd of Voluntary Action East Renfrewshire first described the Home from Hospital project, she was apologetic. “I’m sorry” she said, “but it’s complicated”. She went on to describe the many organisations – public sector, voluntary sector and private sector - the local policies, national policies, new initiatives and existing services that connected and related to older people’s journey home from hospital. “But the good news,” she added, “is that we have a mature local partnership and I believe we can make a difference”.

The official narrative of the issues associated with hospital discharge is well rehearsed. But how do older people experience this situation? What are their expectations, their hopes and fears relating to hospital admission and the transition home, or to a new or newly adapted home? What about health professionals, social workers, carers, family members, neighbours and friends? Actually, what problem is “Home from Hospital” trying to solve and whose problem is it anyway? In a complex system there will be many different perspectives on both the problem and the solution.

This complexity is characteristic of health, social and community care and in working together through Better by Design, partners in East Renfrewshire were looking for two outcomes: They wanted to improve the experience of coming home from hospital for older people and they wanted to learn and develop an approach together that they could apply to any complex problem.

VAER and partners began with exploratory phase. A workshop with stakeholders informed the initial ‘design brief’ and from there we’ve drawn on ethnographies, case studies, desk research and interviews with stakeholders to shape the approach. Interestingly, when talking with stakeholders it was noticeable that most said very little about “Home from Hospital”. Instead, they spoke about their realisation that things had to change. The current systems and services to support older people don’t make sense in the changing world we live in. Stakeholders experienced a tension between ‘keeping the lights on’ – maintaining performance within the current paradigm – and working in new ways and with new models that haven’t yet got a clear form. The people in the partnership were restless and thoughtful but also open minded and optimistic – a great basis for a design-led approach!

It is apparent that partners in East Renfrewshire have positive regard for one another and empathy for the day-to-day pressures that can get in the way of innovation and change. They are also prepared to challenge assumptions and really seek to understand what people want and need and what assets, capabilities and capacity exits in communities that could be reconfigured in service of older people. They were keen to get on and try things, to co-design with older people and prototype services quickly.

Partners are now working differently together, from shared values of putting communities, and in particular older people, at the heart of their work. Health, Social Care and community service providers are integrating their activities and identifying opportunities for improvement together.

Partners in East Renfrewshire focused on four overarching outcomes to guide their activity:

Creating design-led leaders: resourceful social experts who think in possibilities.

Enabling resourceful communities who act together to solve problems.

Collaborating across networks to improve older people’s experience when coming home from hospital.

Through learning by doing they have showed not only that it is possible to design improved services for older people, but also it is possible to change the relationship between commissioners and community providers, between professionals and volunteers and between services and people who need support.

In East Renfrewshire, partners not only co-designed services but co-designed the outcomes they wanted to achieve together, with and for their communities. They have prototyped a process, a way of working together that can be applied to other challenges and have begun to codify this into a ‘Collective Impact’ approach called ‘East Ren Collaborates’. This innovative approach has the potential to sustain system-wide change in the way communities and public services collaborate to make life better for everyone.
Sam Law of Tullochan tells their story of Better by Design

The big one for me is that Better by Design feels like it’s had an impact on the whole of Tullochan’s staff and not just the change team. We have a weekly ‘sit-down’ with staff and it feels like people aren’t just thinking so much about their own projects nowadays. The change team ran a staff development day recently, where we tried out some of the tools and techniques the Better by Design team have been using with us . . . and we got a great reaction! We got loads of good feedback from everyone on all of the projects and we also got some great forward thinking on what people want Tullochan to be in the future.

For all of my time with Tullochan, I think we’ve always been a forward thinking team who share everything with each other . . . we’re all always on the same page. The Better by Design experience has made us all more aware of that and how we can use our awareness and ability to reflect on what we do to make Tullochan even better at what it does.

Some of the reflection and feedback we’ve shared with each other recently has really been quite humbling. With all that we do together at Tullochan, it can be easy to forget the impact we can have on some young people’s lives. Like lots of others, we’re very busy, so to stop together and think about what we do in the ways we have recently is amazing.

Funding will always be an issue, but you know what, we have the talent here to meet challenges like that head-on. I guess the future for Tullochan doesn’t feel so ‘unknown’ to us now and the frameworks we’re learning through Better by Design are really helping us to think better, in spite of being so busy! We have the right skills to take Tullochan into the future and we all know, deep-down, that the sky’s the limit for us. We all bring different strengths to the team, but we’re all very similar in our passion to get our work further out into the community we’re all part of. Better by Design is just helping us to do that . . .

The Soft Stuff is the Hard Stuff

There is a challenge for leaders to create and sustain the conditions for design-led change.

The application of design to public services is not new. A quick Google search will reveal numerous case studies and agencies offering to redesign services, starting from the ‘users’ experience’. However, when talking with colleagues from various design agencies, their frustration is often the same; how can we raise design from good looking graphics, novel toolkits and one-off service improvements, to a more sustainable and strategic response to organisational challenges?

In Better by Design, the organisations that applied to take part were not looking for a one-off fix. Rather than seeking to redesign a single service, the majority wanted to apply design methods to redesign their business model, introduce new, more user-focused ways of working and get off the ‘hamster-wheel’ of short-term, output-driven funding. The focus of the design effort was not so much on a service as on the organisation itself.

Taking a strategic design approach means moving from looking at the pieces, the individual services, to looking at the whole – the organisation itself, its system, culture and processes. While there are numerous examples of service redesign, there are fewer examples of the design-leadership necessary to embed design at a strategic level and use it to continually and sustainably increase impact.

In Better by Design, the chief executives of the participating organisations have stepped forward as pioneers to develop their design leadership and create the conditions within their organisations to enable sustainable change.

We are conditioned to drive for solutions but design encourages us to spend more time exploring problems. At first this can feel frustrating and uncomfortable but with practice we find that fresh perspectives can help to reframe problems and identify new opportunities.

The leadership challenge is to create the space for this exploration, to encourage questioning without fear of blame and to remain open to insights that might challenge the operation at a fundamental level.