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The Third Way for the Third Sector: Using Design to Transfer Knowledge and Improve Service in a Voluntary Community Sector Organisation

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Abstract This paper describes a two-year Knowledge Transfer Partnership that concluded in September 2011. Knowledge Transfer Partnerships (KTP) is a UK-wide activity that helps organisations to improve their competitiveness and productivity by making better use of knowledge, technology and skills within universities, colleges and research organisations. This paper details the outcome of a KTP between Age UK Newcastle and Northumbria University's School of Design that aimed to use Design approaches to improve the charity's services. This paper will describe the recent context for organisations operating in the Voluntary Community Sector and discuss the relevance of a Design approach to both the improvement of customer services in this circumstance, as well as the transfer of knowledge to a capacity-starved organisation. It will also document how Design was used to achieve both of these aims, and the resulting impact of this engagement on the organisation and stakeholders.

1. Introduction

In financially uncertain times such as these, navigating a clear road to service delivery is increasingly challenging. This is especially the case within third-sector organisations where funding, largely derived from central and local government and voluntary donations, is under considerable threat. However, with increasing pressure on voluntary organisations to help deliver vital services, it has become crucial that charities find sustainable solutions to deliver high quality customer service.

Age UK Newcastle, a charity that enhances the status and wellbeing of older people in Newcastle-upon-Tyne, has recognised the key role that a Design ap-

proach can play in helping them to creatively respond and pro-actively to this demand. Rather than engage an outside consultancy to help them to re-evaluate their service offerings, Age UK Newcastle appreciated the long-term benefits of embedding this knowledge within their organisation could bring.

Through the UK Government's Knowledge Transfer Partnership (KTP) scheme, Age UK Newcastle worked with Northumbria University's School of Design until September 2011 to transfer Design capability to the organisation. By embedding this knowledge within the very culture of the charity, Age UK Newcastle could improve their existing services, and also gain a skill base that would help them to develop high quality offerings in the future to continue to meet the needs of an ageing population.

2. Context

Whilst the recession has effected all corners of our society, the Voluntary Community Sector have been particularly impacted by the volatile fiscal climate. Over the past twenty years there has been a significant shift in the Voluntary Community Sector (VCS) landscape, 'from grant aid supporting charities... to them being contracted to do that work on behalf of statutory organisations' [1]. As a result of this increased reliance on public funding, the sector has found itself in an increasingly precarious state with the threat of significant reductions in public sector spending, as well as funding available from trusts and foundations.

In 2008, Age UK Newcastle, who were then known as Age Concern Newcastle, were one of the organisations that gained much of its funding from local government. This is a common picture in the North East of England, where the VCS community has a disproportionate reliance on public money [2]. At this point, the senior management and trustees recognised the potentially hazardous position they were in, and began constructing an agenda to take them toward a more sustainable future.

Although this change agenda was already in full swing when the findings of the Spending Review (2010) were announced, the organisation still felt the full force of its consequences. The local government cutbacks that followed resulted in 73% of the VCS community in the region suffering a reduction in funding, this included Age UK Newcastle. More widely, the consequences of these actions have led to 40% of the region's VCS organisations making redundancies, and over a quarter decreasing the number of services that they provide [3], thereby having a considerable impact on the beneficiaries and communities they serve.

Despite this considerable reduction in capacity, the third sector community has been trying to cope with a sizeable increase in service demand [3]. However, the consequences of these cuts and an uncertain financial future is hampering VCS service deliverers' abilities to develop and deliver quality services. In such a dynamic operating climate, VCS organisations have been finding themselves without the time, resources or process to consider the underlying issues driving any service demand, and therefore the best way for them to respond to that need.

Given these recent pressures, there was an appetite within Age UK Newcastle to consider carefully the value of their current services and potentially reconfigure the way in which those services were offered. But in order to do things differently, they recognised the need to first perceive things differently, and after a chance meeting with a Design for Industry student at Northumbria University, they began to see that Design might provide a different lens through which to view well-established challenges.

3. Initial project

In response to a Royal Society for the encouragement of Arts, Manufactures and Commerce (RSA) competition brief focused on reducing social isolation and loneliness in older people, a Design student had chosen to conduct a design project with the staff, stakeholders and customers of Age Concern Newcastle. Through this collaboration the student conducted first-hand research, accessing older people who at one point were lonely and/or socially isolated. From the insights gained they generated, developed and refined concepts that sensitively and appropriately addressed the needs identified through the research. They also paid particular attention to the communication at all touchpoints¹ of the service to improve the customer's journey, as well as addressing the overall communication package to increase awareness and create a more accurate and positive picture of the services provided by Age Concern Newcastle.

In using a participatory approach, rather than an extractive one, the student created a service that was both appropriate, and of genuine value. The organisation

¹ *Touchpoints are the elements of a Service as experienced by a real service-user and include a wide variety of components. Depending on the nature of the Service being developed, Touchpoints can include: waiting rooms, call centres, texts, bus journeys, pass cards, social networks, tickets, rewards, podcasts, referrals, feedback forms, payment receipts, rewards, queues etc as well as traditional marketing collateral.*

had previously tried to tackle exactly this issue with traditional Marketing approaches without success, but through a Design approach, the service created was pertinent, sensitive and completely feasible. Age Concern Newcastle saw the potential for an iterative, participatory Design process to provide a key foundation for the organisation's ongoing change process, ensuring the customers' needs and demands were accurately represented throughout.

4. Design for improving services

Despite the term 'design' making more frequent appearances in policy and strategy documents within the Third Sector in recent years, the Design discipline is rarely formerly engaged to help develop services. Similarly, the need to engage service users in service development is a widely accepted necessity in the work of voluntary and public sector organisations, but whilst the concept may be embraced by many organisations, the practice is often not undertaken properly [4]. Outside of the Design community, there is often insufficient understanding of the role Design can play. Frequently thought of as a styling activity, non-designers fail to comprehend that the approach can help organisations to understand the needs and demands of their customers, and translate these into tangible outcomes.

Design has traditionally been viewed as a commercial activity. However, as the discipline has expanded, it has moved into a new arena of tackling social issues within a service context; creating systems and services to help people and society, as opposed to selling them for commercial gains [5]. The successes of programmes that use Design to tackle social challenges, such as Dott 07 [6] and Public Services by Design [7] have demonstrated on an international level that Design Thinking can make a valuable contribution to help tackle today's social and economic challenges [8].

Recent studies by scholars, practitioners and government bodies have suggested that Design has 'the power to stimulate or drive innovation and transform organisations and even societies' [9]. In the context of social issues, viewing an issue from a Design perspective has been said to bridge the gap between deductive and inductive thinking; using abductive reasoning to consider what could be [10]. In actively looking for new opportunities, challenging accepted explanations and inferring new possibilities, thinking as a Designer can help to visualise new ways of addressing well-established problems [10].

Adopting this creative perspective has been termed Design Thinking [11]; quite literally thinking as a designer would [10]. This very broad definition has been

adeptly described by Tim Brown of IDEO, who states that it is a ‘a discipline that uses the designer’s sensibility and methods to match people’s needs with what is technologically feasible and what a viable business strategy can convert to customer value and market opportunity’ [11].

Design Thinking and its abductive reasoning has been termed the ‘third way’ [12]; an alternative to a purely subjective, intuitive way of thinking, and a rational, analytical approach. In recent years, there has been much documentation of how this ‘third way’ can help organisations to respond to the challenges faced in times of austerity ‘by thinking, and doing, differently’ [13].

Design Thinking’s disruptive, creative approach can help organisations to think in a radically different way, as opposed to taking small, incremental steps based solely on what exists. This made it an ideal approach to adopt at Age UK Newcastle when trying to address social delivery challenges in a more sustainable way.

5. Design for knowledge transfer

An important part of the Design Thinking approach that aligns itself with the VCS ethos, is its human-centered, participatory nature. Corrigan sees one of the distinguishing aspects of the third sector as its ability to work with its customers and empower them; often turning them from service recipients into service providers [14]. The ethos of a VCS organisation is not only to help address an issue, but to help people affected by that issue to add value to their own lives by being active in solving that problem [14]. Similarly, contemporary Design practice has moved from designing for people, to designing *with* people, and actively draws on the expertise and opinions of all stakeholders in the design process [9, 11, 15].

More importantly, Design Thinking sees the potential in everyone to be a designer [16, 17, 18] and places the tools and skills from the Design profession into the hands of these stakeholders, to help to co-produce the best service [11]. Design is therefore an appropriate approach to adopt in order to build on the participation already advocated within the organisation, and extend that to involve and capture insights from all of the stakeholders.

Likewise, the participatory nature of Design makes it an ideal vehicle for knowledge transfer. By actively involving stakeholders through a project process, they gain an in-depth understanding of the construction and use of tools and methodologies at every stage, as well as learning vital information about the services they currently provide and what their customers are looking for. The Design ap-

proach helps them to experience the application of the knowledge, and intimately understand its value, thus helping to fully integrate into organisational practice.

6. Culture change

In September 2009, Age UK Newcastle embarked on a two-year Knowledge Transfer Partnership programme with Northumbria University to begin to capitalize on the Design knowledge that they had been introduced to. As part of that partnership, a new Design Graduate with excellent design and interpersonal skills was carefully selected and placed into the organisation to orchestrate this change from within. The graduate was supported by an academic team from Northumbria University School of Design.

The first year of this project was planned to contribute towards the overall strategy of the organisation, and define actions to be taken over the coming periods to ensure that they were meeting their customers' needs. To contribute towards this, the designer devised a project structure designed to effect culture change.

In order to achieve this cultural change within the organisation, it was essential to engage all stakeholders as quickly as possible. The first challenge was to help all the people in the organisation to fully understand the value of Design Thinking and how it promotes better customer experience. This was hindered by the levels of understanding of the term 'design', magnified when coupled with applying this in a service context.

By introducing examples of conceptual service developments that had been created in the context of their work, it was possible to make Design Thinking tangible for stakeholders. Using the student project that had started the organisation's design engagement helped people understand that the process was (in this case) about simple, sensible innovation to improve what was offered, not drastically alter it. Familiar examples of Design from popular television documentaries also played a role in demonstrating the breadth of 'design' and the role that the non-designer can play. Examples such as the popular UK TV chef Jamie Oliver and the retail expert Mary Portas were used to show that design is not always about 'making' something, it can be about adopting a different approach.

Whilst Age UK Newcastle had a commitment to improving services, it was essential that strategic culture change happened simultaneously. Age UK Newcastle has traditionally been a top-down organisation. However, as part of the Design

approach knowledge would be gleaned from front-line staff, and they would be actively involved in making strategic decisions. It was therefore important that the senior managers embraced this practice, and reflected it throughout the organisation.

To this end, the KTP team devised a programme for senior managers to meet on a regular basis to share current work and develop their design skills. Named 'Ideas for Change', it also became a forum for discussing organisational issues like the financial structure of the charity, to add additional layers of knowledge that helped people shape ideas and give context to the overall change process.

Similarly, staff meetings were reinstated, which had dwindled during the previous two years. This two-year hiatus had resulted in a lack of communication and cohesion in the team; departments worked in silos and were not connecting their activities together, impacting on the unity of Age UK Newcastle's services. By developing a regular staff meeting programme, there was a platform for all staff to discuss work or share ideas, and this provided a channel of communication for changes happening in the wider world, as well as those being instigated through the senior management series.

Both 'Ideas for Change' and the staff meeting programme helped to encourage cross-service communication and working on ideas together to develop a more cohesive suite of services. It also helped to shift staffs' focus from their individual task and department, to seeing themselves as part of a larger organisation, and where their role contributed on this macro scale.

7. The importance of process

Another outcome of this new staff programme was recognition of the speed at which services were currently being designed, developed and implemented. Many third-sector organisations are, necessarily, reactive to funding opportunities, but this can lead to short-term, unsustainable services being put in place (and then removed when the funding has run out) without due consideration to the overall impact on strategic direction, brand, or most importantly, service users.

To help mitigate against the negative effects of this reactive style and based on a development of the UK Design Council model [19], a Research, Test, Refine, Implement, Review approach to new service development was introduced. The team also underpinned the importance of using customer experience to inform

which direction to take at every stage, which helped support the shift in emphasis towards becoming a service-focused organisation.

In instilling the importance of process into the organisation, staff at all levels were taught how to prototype ideas and to refine, where necessary, before launching in order to reduce risk; this can require managing enthusiasm and reviewing the business and user case. It is particularly important to test ideas in this sector, where there is financial uncertainty and a vulnerable clientele. The design approach reduces this risk by actively prototyping and testing ideas for service elements before selecting the most effective solutions for detailed development. The KTP team introduced the knowledge and expertise to develop feasible prototypes that were necessary to elicit reliable service-user feedback.

To support the stages of the process, a toolkit was developed which detailed the importance of each stage, as well as providing a series of methods and tools that could be used to help to produce the best possible outcome. Each example was clearly explained in familiar language, and included a description of where it worked well, and how it should be managed. This put the tools of the trade into the staffs' hands to empower them to use the approach as part of their everyday activity.

8. Connecting with the customer

As part of this first year programme, the design team also focused on aligning organisational policy with customer needs. Unusually for most Design challenges, Age UK Newcastle were very empathetic to the needs of their customer; they had established relationships with many of them that meant they could offer, to some extent, a tailored service. Whilst in most organisations, the problem can be helping the staff to associate with the emotions of their customer, conversely in smaller charity groups, they can know their clientele too well. Knowing the specific circumstances of individual service users had coloured the way in which staff responded to service development; “we can't do that, Ethyl couldn't come on a Tuesday”. Staff therefore focused on their current customer base when developing services, and consulted with them primarily when evaluating service offerings, providing a distorted representation of their success.

To help staff to see the bigger picture without losing sight of the individual, staff were involved in the facilitation of workshops to experience how best to gather true opinions from both existing and potential customers. Staff were in-

structed on the development and use of personas. This provided them with the means to develop archetypal characters that were used to support service developments in general without becoming too focused on the detail of an individual circumstance [20, 21].

To further bridge the gap between the staff and older person's perspective, all staff were invited to take part in a observational exercise around customer service. Named a 'Staff Safari', it was designed to encourage members of staff to think as a customer, and explore the different experiences on offer. Each member of staff was given a disposable camera and asked to take photographs that represented 'good' and 'needs to be improved' customer service, both within, and external to, the organisation. The photographs acted as a bridge between what the staff demanded as customers, and what they should be aspiring to provide within their own working environment. Discussing the ideas also provided staff with a platform to express their views and opinions about all parts of the organization; an opportunity they had not previously been afforded.

A Design approach addresses the whole person, the whole system, the whole configuration of people and tasks; it helps individuals to see services in the round. Operational staff tend to focus on what they have control over, or what they think they have control over. Whilst the activity had helped staff to make suggestions about other areas of the organisation, it also helped them to consider the user journey that occurs before or after users engage in the core service activity. In using a camera to capture issues that affected customer experience, they began to recognise the importance of each stage of the customer's experience, including their journey to the building and their first contact with a member of staff. The KTP team used staffs' photographs to create a photographic customer journey, demonstrating visually where customers might encounter barriers to accessing a service. This provided staff with the opportunity to look beyond their immediate activities and see the service more holistically.

The 'Staff Safari' also helped to give staff permission to make changes, and demonstrated that small adjustments that take little time or money can have a big impact. Involving staff directly in this design activity demonstrated the value of the tool in gathering insights, and providing a vehicle to contribute ideas and opinions. It also started the whole organisation collectively on the path to making changes towards improving service experience.

9. Carving a path

During the KTP project, Age UK Newcastle was continuously affected by changes occurring in their dynamic operating context. Although the management had carefully planned towards more sustainable practice, the organisation's activity was threatened. As the project entered its second year, the organisation was in a particularly difficult period, staff found it increasingly difficult to focus on innovation. However, the KTP team recognised the importance of continuing to follow the Design approach, as customer-focused improvements would help to ensure the long-term future of the organisation.

To this end, the KTP team decided to conduct a design project within one area of the organisation; the Befriending Service, which provides social contact for isolated, lonely older people. Currently working at capacity, and with an uncertain funding future, it was an excellent role model to review in full view of the organisation; providing something to imitate in order to affect real system change.

The Befriending team were very keen to review their service offer, as they had a significant waiting list that they wanted to address. However, they were very solution-focused and wanted to devise options for expansion as soon as possible; they interpreted the demand for the service as effectiveness. They also gave little consideration to the efficiency of the offer.

To re-balance their perspective, staff were asked to articulate, and attribute a time to, every activity undertaken when delivering this service. A simple task, but it highlighted that the administration of the service was absorbing the majority of the coordinator's time. A budget analysis also revealed that the service had an organisational cost of £900 per service user, per year, a figure far higher than the team's estimates. These initial steps created amongst the team a motivation to address the inefficiencies in the service laying the foundations for undertaking a thorough research process.

10. Thoroughly designed research

The Befriending department previously conducted limited, infrequent research, considering it to be too costly for one so resource-strapped. The research it did conduct asked closed questions about the service and any improvements users would like to see. This structured style of evaluation provided little feedback and of poor quality, providing no guidance regarding the service's actual performance.

To prove the value of appropriately designed research, the KTP team wanted the staff to conduct as much of the activity as possible. They trained them in de-

sign research methods, so that they could understand the purpose of the techniques, and ensure that they collected the information in a consistent and appropriate way. Each activity was also designed with the staff team, focusing on the needs of the participants, and how best to elicit the information whilst providing an enjoyable experience for them. In constructing the activities with the team, they were shown that research could be thoroughly designed, and yet remain flexible and work within the organisation's ethical guidelines.

First, existing recipients of the Befriending service were invited to come to an event to share their experiences and opinions. To prompt discussion, two fictional characters were introduced and the participants asked to suggest things that could improve the characters' quality of life. By creating characters in familiar circumstances and asking participants to consider what they may need and how they could be helped, this allowed people to think about their own needs without feeling embarrassed in the group setting.

To elicit the opinions of people on the waiting list, and those who were unable to travel, participants were visited in their own homes and semi-structured interviews were conducted. Participants were asked to complete a diary sheet to share with the team what they usually did on a day-to-day basis, and this formed the basis of an interview; allowing the researchers to tease out the emotions they experienced without prying into their personal life. Interviewers were also given conversation tips, feeder questions and visual prompts to help them be truly responsive to the participant, whilst gathering the necessary information.

Throughout the research process, researchers were asked to gather images of the participants or things that were of value to them. The service team were initially reluctant to do this, citing the vulnerable nature of the participants as a reason not to capture any information. The KTP team encouraged them to make this departure from their usual practice and ask each participant individually; respecting their decision, rather than making one for them. In practice, what they found was that almost every older person agreed to be filmed and photographed, and actually enjoyed the attention being paid to them and their belongings, making for a rich, interesting dialogue.

The photographs were used to create profiles of each older person and capture their own personal story. This format helped to gather data regarding family and friends, their typical week, and hobbies and interests in a visually stimulating way. The profiles also helped the staff remember details of interviews, inspired them to create solutions for real people, and helped to communicate effectively the content of interviews with other team members.

11. Doing things differently

Third sector organisations often work in partnership, but different funding bodies and management guidelines mean there is rarely comparable research data. It is therefore not common practice at Age UK Newcastle to gather and consider all data simultaneously, but this is exactly what the KTP team did!

The process helped the team to pinpoint commonalities and differences in their findings, threading the information together to form a more cohesive understanding of what they had discovered. In examining the information as a whole, staff were also able to draw some conclusions based on in-depth research, rather than generalisations. The findings were translated into four distinct areas that needed to be addressed: connecting people with genuine friends; customer progression; enhancing the existing offer and more volunteering roles. These were used to inform the idea generation stage.

Where there had been no research, there had also been no idea generation; Age UK Newcastle had often emulated good practice taken from elsewhere without validating whether it was appropriate for their aim, customer or circumstance. The previous stages had provided insight into the changing needs, aspirations and interests of older people, and the KTP team wanted to use the research findings to generate numerous potential service innovations to demonstrate that those needs could be addressed in different ways.

The team were asked to consider not how they could improve their service, but simply how they could fulfil its aim: offering social contact to isolated older people. In rewording the question, the KTP team gave the service team permission to think broadly, creatively and differently. Staff found that by focusing on the potential of an idea, and withholding judgement, they could take inspiration from each other and produce surprising yet appropriate suggestions. Reframing the question gave the project team permission to think broadly, creatively and differently. The profiles were then used to inspire this process, and ensure the KTP team created solutions for real people; drawing out the important information to help develop new ideas that would address their needs.

The generated ideas were then shared with staff members from across the organisation to get their opinions on which ones should be a priority to develop. From this feedback, and the knowledge gained through the previous stages, the team developed a 'Telephone Neighbourhood' concept. It suggested a way of connecting customers with other customers by forming a 'neighbourhood' that contact each other by telephone every week, whilst the group is supported by a volunteer who helps them to make connections and develop friendships. It was

suggested that once the network was established, the volunteer would gradually withdraw and the network would then self-sustain, making it a much more manageable option for the organisation in the long-term.

The concept was well received by staff across the entire organisation, which was important to ensure that it was considered an organisational initiative, rather than being segregated as a departmental offer. Additionally, some of the other generated ideas also provided inspiration for other departments and inspired them to review their current offers to older people and create more appropriate options.

12. Testing the water

Being such a small organisation, Age UK Newcastle had never placed much emphasis on prototyping ideas before launching them. This has often led to unforeseen issues that have proved costly to the charity. Having instilled the importance of process across the charity, the team understood the need to test the 'Telephone Neighbourhood' concept in order to judge whether or not it was an appropriate response to the research findings.

To this end, the service was piloted with a control group to check that it operated as intended. The monitoring and feedback process was carefully designed to show whether the service was both effective and efficient, and giving the team an opportunity to refine the model before launching it full scale. At the time of this paper, the pilot was still being undertaken, but with positive initial feedback.

13. Wider implications

Whilst the service review had resulted in a service innovation, there were also wider implications to the research findings that the design team wanted to share.

The design team developed a blueprint model for an ideal social care service experience, based on the results of the research. It responded to the findings that customers were not being accurately referred into the organisation, and instead were being basically assessed for a service i.e. a lonely person who was referred to Befriending by Social Services would be assessed for that service, not for any others that they might also be interested in. The blueprint highlighted the need to create a more holistic plan for a customer that would help them to reach personal ob-

jectives i.e. confidence building, in order that they would become a service provider, and not just a service recipient.

The model was shared with a wide group of stakeholders in the sector to much acclaim. By linking the more generic model to real client and service issues, the work had a more profound impact on their thinking, appealing to them on an emotional as well as professional level.

The service review was incredibly successful on a multitude of levels, resulting not only in an improved service offering, but also organisation policy that reflects the needs of the client group. The project work also inspired the team to apply this Service Design approach across the rest of their department. As a result, Age UK Newcastle are re-assessing all of their services and possible development options, and also seeing a Service Design approach as crucial to those reviews.

14. Conclusions

This programme has had a wide-reaching impact that has made Age UK Newcastle more customer-focused, more sustainable and more responsive.

The Knowledge Transfer Partnership team have found that using a Design approach has enabled managers, staff and service recipients to engage in service development in a different way by going on the journey together. The process provided a safe space for constructive feedback, opportunities to understand the subtleties of expectations and perceptions, and an approach for testing out new ideas as part of the design and development of services. It has been shown that Design offers both a rigour and creativity to service development, and complements more routine forms of engagement such as surveys, audits or focus group discussions.

The use of images and imaginative presentation as part of the Design process has been very effective in enabling people to get quickly to the heart of the matter. In many existing engagement processes, the use of this type of imagery, be it photographs, video or illustration, may be regarded as a luxury rather than a necessity. However, the team have shown that visualising an idea, process or touchpoint has a profound impact on a stakeholder's ability to understand the content, and also their likelihood to contribute feedback.

Our experiences have shown us that effective organisational change can be achieved by having someone in-house driving the change, as opposed to an exter-

nal consultant influencing it. As an employed member of staff, the designer was a constant resource to help support the next steps of the organisational change, engaging stakeholders at pertinent times during their day-to-day activity, gradually educating them in Design Thinking methodology. They were in an ideal position to learn about, predict and respond to the changing contexts to produce a truly responsive approach, which is key for Third Sector organisations.

At a time when VCS organisations, and therefore the people that they help, are particularly vulnerable, the need for evidence-based practice becomes more important. The authors feel that Design Thinking offers a rigorous approach that provides the evidence base for service re-design and development, as well as the tools with which to embed this imaginative way of working.

The legacy of this project has been a culture-shift where service experience is at the core of the organisations work and staff are empowered to explore and initiate new opportunities (in a methodical way). We feel this would not have been achieved without the focus on practically using this new knowledge whilst simultaneously embedding it.

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