The Lasting Difference

Sustaining independent support projects, organisations and impact

Challenges, Learning and Resources

Support in the Right Direction and Innovation Fund
Sustainability workshop programme 2017-18

Introduction
This resource shares the learning, tools and tips generated by a programme of workshops on sustainability, centred on the Lasting Difference toolkit. The programme ran from August 2017 to January 2018, involving 52 people from 28 organisations across Scotland. It was hosted by Scottish Government, who had funded the participating organisations to support the implementation of Self-Directed Support (providing independent support and/or piloting innovations). However, the challenges participants worked on during the programme are almost universal. The learning presented is therefore applicable to anyone working in health and social care.

Programme structure and content
The programme commenced with an introductory session where participants identified their key sustainability challenges. The following workshops then addressed these by focusing on the four core capabilities of sustainability:

- **Involvement**
- **Income Generation**
- **Innovation and Improvement**
- **Impact Measurement**

The programme concluded with a final session to help participants embed their learning, assess exit strategy options and develop sustainability action plans.

About the report
The report presents programme learning under each of the four sustainability capabilities. Each section summarises:

- Challenges identified
- Suggestions and learning to help address these challenges and some
- Tools and resources shared during the programme.

Background
To support the implementation of the Social Care (Self-directed Support) (Scotland) Act 2013 the Scottish Government invested in two funding programmes to build capacity and learning in third sector organisations. As the end of the funding cycle approached in March 2018, the policy team at Scottish Government felt that a programme of workshops, based on the popular third sector sustainability toolkit 'A Lasting Difference' would provide useful capacity building support to help organisations prepare for future sustainability and impact.

The programme was designed to be participatory and responsive. It gave people time and space to explore their challenges with their peers and with dedicated support from Wren & Greyhound. Action planning helped encourage the sharing and implementation of learning in their organisations.

Thank you to all who took part in the programme – your enthusiasm for sharing your challenges, experience and expertise was the inspiration for this document.

Challenge: Nurturing involvement

How can we create processes, approaches and space to nurture meaningful involvement? How can we best involve people who use our services? And our staff, board members and other stakeholders?

Learning

Meaningful involvement takes resources and time. It is an investment and won't happen by magic. It also takes mutual persistence, patience, respect, trust, honesty and equality.

Involvement is reciprocal – people want to give *and* get something from it. Be clear on what people get from their involvement – and what you need from them.

Think about and plan your parameters for involvement – who are you involving, why and at what 'level'?

Make it as easy as possible for people to get involved by using different methods, times and approaches. For example, not everyone wants to be involved at decision-making level, some prefer to be involved in particular aspects of your work, or at particular times.

Always give feedback about what has happened as a result of any involvement activity.

Challenge: Sharing ownership, power and risk

How can we share ownership of our work to ensure the impact is sustained? And when there are a range of partners 'in the room' – commissioners, service providers and service users – how can we address the balance the power and create a culture of working together?

Learning

Involving others supports development and sustainability, generating buy-in and ideas from people/communities, staff, board members and partners. It helps to both shape your work and share your learning, supporting its ongoing sustainability and impact.

At times partnerships can be challenging – so it is important to remember the aims and goals that you and your partners share. Be clear on what you bring and how you add value to partners (e.g. commissioners). Ask them how you can help them meet their priorities (these might not be the obvious 'presenting' priorities!).

Resources

National Standards for Community Engagement: http://www.voicescotland.org.uk
National Involvement Network Charter for Involvement:
https://arcscotland.org.uk/resources/publications/charter-for-involvement/

Slides shared by two of our guest speakers, Louise Morgan and Jess Wade:
http://www.thelastingdifference.com/wp-content/uploads/2017/07/Golden-Rules-for-involvement.pdf
http://www.thelastingdifference.com/wp-content/uploads/2017/07/How-to-win-friends.pdf

Income generation

Challenge: Capacity

We are working at or beyond our maximum safe capacity - how can we best focus our time and resources to raise our profile?

Learning

Cultivate, nurture and prioritise existing relationships. This is cheaper, more effective and more time efficient than developing new ones.

Think about how you can involve your whole team – income generation and marketing are not one person's job. 'Relationship marketing' is where quality, customer service and marketing intersect. In this way of thinking, marketing is everyone's job. Yet the internal market is often overlooked – do colleagues at all levels know their role in promoting the organisation?

Challenge: Diversifying income and having a long-term strategy

How do we diversity our funding and plan for the long-term?

Learning

Income generation means taking a holistic approach to all sources of revenue: grants, contracts, donations, events and trading. Develop an income generation strategy that aligns with other plans (e.g. communications, marketing) to help you analyse your income sources and proactively plan your long-term income generation activity.

Know your markets and customers – what do they need from you? Why do they come to you? What other markets or customers might share these needs? How can you reach and serve them?

Be clear what you are 'selling' – and what you are not. Saying no is okay if it maintains your quality, purpose and identity – avoid simply 'chasing the money'.

When planning your marketing and promotion activity remember **'AIDA'** – Traditional marketing generates **A**wareness and **I**nterest. **D**ecision-making and **A**ction require higher bandwidth communication (face to face, events, meetings, video etc.).

Work out the type and levels of engagement you have with your current and potential stakeholders. Are they based on one-off transactions? Relationships? Partnerships? Do you have supporters and advocates?

It's okay to rely on word of mouth marketing, but remember to support it with clear asks, messages and, most importantly, thanks!

Resources

Visit the Income Generation page on The Lasting Difference website for free downloadable resources. Includes an income generation strategy template and the fun *'Preparing for the Market'* exercise we used – great for helping colleagues discuss their role in marketing and promoting your organisation's work.

Challenge: Supporting innovation in our organisation

How do we develop and sustain a *culture* of innovation and improvement that helps us re-examine our approaches/activities to make sure they are still valid?
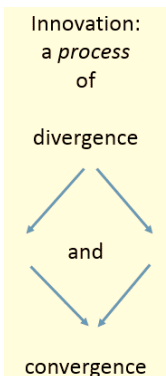
Learning

Leadership and culture are key to encouraging innovation.

To support continuous learning and idea development, give yourself and others permission to take the time and space to read, reflect, ponder and recharge.

Aim for diversity and balance of teams – those who 'fly the ideas' and those who 'rein things in'. Everyone has a part to play, but people often benefit from guidance on when it's time for idea generation (divergent thinking) and when it's time for refining, selecting and acting on ideas (convergent thinking).

Setting clear boundaries and developing a supportive and trusting culture helps encourage people to think creatively and take 'sensible' risks. Trust people to do their job. Agree the outcomes and vision – and then get out of their way!.

Use creative methods – such as the use of metaphors – to think differently and generate new ideas/approaches. And get out of the office! Change your routines - meet and work in places that nurture creative thinking.

Innovation:
a *process*
of
divergence
and
convergence

Challenge: Knowing / selecting which ideas to pursue

It's easy to respond to interesting things – but how do we know if it's interesting just because it's new, or if it's potentially transformative?

Learning

Radical 'new' ideas/breakthroughs are rare – most innovation is about incremental improvements – learning, development and change.
'If you wish to make an apple pie from scratch,
you must first invent the universe.' Carl Sagan

Pause and take time to recognise overload and deal with this first before generating more ideas.

Screen your new ideas against your core purpose, aims, values and capacity. And pilot your ideas to test if they work – do small tests of change – fail fast!
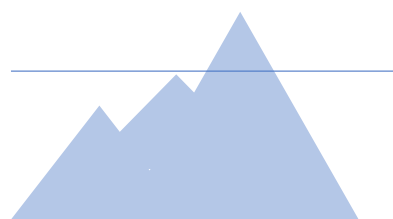
The innovation iceberg

Above the waterline, radical new ideas & breakthroughs.

Below it, adaption & incremental improvement.

Challenge: Encouraging innovation in other organisations

How do we make sure that new ideas and initiatives are contributing to the wider sector and not 'cluttering' it with duplication or confusion?

Learning

Ask yourself 'are we the best people to do this?'. There may be a gap, but is it your role to fill it?

Collaborate to innovate. Learn from others – partners, people you work with and other organisations. Listen to different perspectives.

Encourage creative debate. Good ideas are everywhere - the brightest people don't all work for you.

Share your learning at events. You can create and facilitate your own or speak at other people's. Don't wait to be asked, become more proactive in sharing learning from your work, influencing practice and policy development.

Resources

Visit the Innovation and Improvement page of The Lasting Difference website for free downloadable resources. This includes examples of innovative strategic plans and project screening tools, kindly shared as part of this programme by:

Deanna Wolf, Carers Trust Scotland http://www.thelastingdifference.com/wp-content/uploads/2017/07/Project-profile-DeannaWolf.docx

Tricia McLean, Grampian Opportunities http://www.thelastingdifference.com/wp-content/uploads/2017/07/140604_GO_Matrix__final.doc

Impact measurement

Challenge: Measuring impact

How do we ensure we're measuring *our* impact? It can take a long time to see the evidence and effect of the work we do - so how do we report on these long-term outcomes and show our impact? How do we measure the 'unseen' or 'intangibles' (wellbeing, self -esteem, etc.)?

Learning

Start by being clear on what you are trying to achieve and therefore measure. Clear outcomes and indicators help avoid most evaluation pitfalls and challenges (and pretty much all of the ones people brought to the programme).

Long term change takes time, so you might need to scale back the outcomes you can lay claim to. But you can evidence smaller changes along the way. Set realistic outcomes and be clear where you can show your work has *directly* achieved an outcome - and where you have made a *contribution* towards it.

Indicators are the specific, measurable part of outcomes. Breaking intangible outcomes down into more manageable and measurable chunks, they are your friend! They help you to plan, evaluate, make sense of data, and structure reports. Ask yourself '*What does the outcome look like in practice?*'.

Challenge: Gathering data

How do we gather data in a consistent and rounded way to show progress towards outcomes? Can we do it without overburdening people?

Learning

Triangulate! Gather data from different sources (service users; partners/ stakeholders; internal records; observations; assessments). This reduces reliance on (and lifts the burden from) client feedback; avoids evaluation fatigue; and strengthens the credibility of your evaluations.

OUTCOME

Quantitative and qualitative data work together, each answering the questions raised by the other. For example, if you have some nice quotes about what people think about your service, you might want to know how many people feel that way. In this case you could seek more quantitative information. Likewise, you might know how many people took part, but not how or why, so you need more qualitative information. Quantitative data provides BREADTH ⇔ and qualitative information gives DEPTH ⇕. Use both to give you a rounded picture of impact.

Challenge: Analysis and reporting

How do we best analyse and present findings? What's the best way to capture compelling stories for different audiences? And how do make sure we identify and act on findings and learning?

Learning

Don't start to write a report until you've done your analysis and know what you are going to say. This will save you a lot of time and agony later! [In our experience, it cuts in half the time we spend writing reports].

Analyse data by asking yourself **'what', 'so what', 'what then?'**.
- **What?** What data do I have?
- **So what?** What does the data mean? What does it tell me?
- **What then?** What conclusions can I draw?

This structure can also be used to present and contextualise information in reports.
For example:
- We have 2000 Twitter followers (What)
- This is a 25% increase on last year (So what)
- This indicates that our social media campaign was successful. We will continue it next year and learn more about how to convert 'likes' into active support. (What then).

Resources

We highly recommend the range of straightforward tools that can be found on the Evaluation Support Scotland website.

The Impact Measurement page of The Lasting Difference website showcases helpful examples of creative evaluation report formats. It also links to a comprehensive set of evaluation tools in Shared Care Scotland's Easy Evaluation Toolkit:
https://www.sharedcarescotland.org.uk/resources/tools/evaluation-toolkit/

Update!

Our Lasting Difference Implementation Guide is now available as a consultation draft. Building on many of the points presented here, it distils our last two years of learning from workshops, learning sets and consultancy. It includes:

New sections on Individual Leadership, helping you assess your power and priorities for leading the Lasting Difference in your workplace.

New implementation timelines for taking action on sustainability at any point in a project or organisation's lifecycle.

Case studies of how other organisations have used the Lasting Difference for themselves.

Download it here:

http://www.thelastingdifference.com/wp-content/uploads/2017/07/Implementation-Guide.pdf