# Infrastructure Design Lab

Established programme learnings and recommendations

# Acknowledgements

The Infrastructure Design Lab was funded by the The National Lottery Community Fund (TNLCF) and delivered by Shift, Collaborative Future, DataKind UK and SIDE Labs, alongside a range of other supporting organisations and freelancers. The seven infrastructure organisations taking part were Action with Communities in Rural England (ACRE), Carmarthenshire Association of Voluntary Services (CAVS), Community Transport Association (CTA), Glasgow Council for the Voluntary Sector (GCVS), The No Accommodation Network (NACCOM), National Federation of Young Farmers' Clubs (NFYFC), and Voluntary Organisations' Network North East (VONNE).

We'd like to thank all of the support organisations and participants who helped deliver and take part in the IDL, particularly for sharing their learnings with us so openly. The learnings shared in this report would not be possible without their generous contributions.

# A note on our learning process

The learnings surfaced in this report are generated from a mixed-method qualitative learning approach, predominantly via individual and group reflections, and end of programme semi-structured interviews. Additional learning within the programme can be found on the infrastructure design lab blog, and mid-programme learning updates shared with the The National Lottery Community Fund. In order to be as open and honest with our learnings as possible, we've anonymised direct quotes from both cohort members and our delivery partners. It's also worth noting, learning was predominantly conducted and synthesised by Shift, who were also the main convening partner of the programme. With a small sample participating in the infrastructure design lab, we do not claim these learnings can be truly representative at either a cohort level or across the broader 'infrastructure' sector. Instead, we hope these learnings serve to encourage continued funder reflection, dialogue with infrastructure organisations and comparison with other support programmes to draw out wider findings.

# Contents

# Glossary

**Established Infrastructure Design Lab (IDL):** The name of this funded programme from by The National Lottery Community Fund. Another programme ran during the same period for emerging infrastructure organisations convened by Careful Industries.

**Infrastructure organisation:** A VCSE organisation that supports other organisations within a specific region or sector, typically to help build capacity and meet sector-wide support needs.

**Cohort (member):** One of the seven cohort organisations that participated in the established infrastructure design lab.

**Delivery partner:** One of the many organisations that helped to deliver the established infrastructure design lab

**Convener:** In this case, Shift, who held the overall budget, administration, and reporting responsibilities for the established infrastructure design lab, helping to match organisations to relevant support.

# 01
# Executive summary

A summary of the report's key learnings and recommendations

# Executive summary

**Infrastructure organisations are often considered the 'glue' of the VCSE sector.** These organisations provide bedrock services across civil society; providing a combination of connecting, capacity building, service developing, influencing, and network support to deliver their social mission, whether supporting single-issue or place-based VCSE's across the UK.

Like much of the VCSE sector, infrastructure organisations face constant upheaval, still recovering from and adapting to a decade of funding cuts, a global pandemic, changes to the way we work, and grappling with the delivery of increasingly complex, remote, digital, or in-person services.

Given such a challenging backdrop for infrastructure organisations operating in today's VCSE sector, a key question arises, what does it take for infrastructure organisations to keep their head above the water, and ensure that they are 'fit for future' operating environments?

For many infrastructure organisations, identifying the internal structures, resource, and capability required to support long-term transformation is understandably de-prioritised when met with increasing service demand amidst constant flux and increasing operational complexity. The current operating environment makes a strong case for core funding - providing infrastructure organisations with the budget, support, and breathing space needed to work through longer-term change priorities.

**The established infrastructure design lab (IDL)** was commissioned by The National Lottery Community Fund (TNLCF) for that purpose; a cohort-based programme of capacity development and support running over 16 months. The programme aimed to help 7 infrastructure organisations to deliver on emerging priorities, address external pressures and overcome internal barriers to change. The established programme was delivered over three key phases; set up, scoping and design, and programme delivery - supported by a range of data, digital, design, and wider organisational change partners.

This report shares an overview of what we've learned about infrastructure organisations, their support needs, alongside key learnings from delivering a programme of support. We also offer recommendations for TNLCF and the wider sector to consider for future funding, and hope these learnings contribute to a wider dialogue around how sector initiatives can best support impactful, sustainable change for infrastructure bodies.

Early on in the design of the IDL, we pivoted from a shared curriculum model of support, to a **tailored, project- specific** programme. This change reflected the diversity within the cohort, with all members sharing distinctly different needs, and only limited overlap to justify working towards similar outcomes or goals. A key learning for this programme has been understanding how to effectively diagnose where infrastructure organisations are on their digital and wider transformation journeys, to ensure they are receiving the most appropriate types of support from 'lab' type programmes. Our resulting model of support focused on a delivering a live project with a clear goal for each organisation participating in the design lab.

To support project delivery, each organisation was matched with two co-designers, with appropriate expertise and skill sets to help deliver on the project and navigate any internal barriers to change. We supplemented this support with access to foundational training, tailored resources and wider consultants across the design lab, as well as opportunities to engage in peer learning sessions and to experiment with digital tools to support new ways of working.

Emerging programme outcomes suggest all organisations have been able to make significant progress on their goals; designing or developing new services, updating existing membership platforms, segmenting their members to provide better communication, implementing new databases or approaches to data analysis and

management, or thinking about better ways to offer capacity building support remotely. Beyond project outputs, some of the cohort report increased knowledge of their members, new digital change capabilities and better strategic awareness of how to resource and sustain this work internally.

**The programme was not without complexity**, with challenges surfacing throughout delivery. Changes to the way support was provided upfront led to an uncertain, slow start and an extended scoping period, as delivery providers contemplated how to best adapt their support to the stage and capacity limitations of the infrastructure organisations. Infrastructure organisations often found the pace of delivery difficult to resource and navigate alongside other organisational priorities, with

many project teams introduced to a new language, way of working, tools, and processes that took time to get up to speed with. Overall, participants shared reflections of a beneficial, rewarding experience of participating in the design lab, but one that was not without its hurdles.

The programme's ambition to deliver on such a diverse range of cohort needs often asked too much too quickly, expecting organisations to simultaneously develop new opportunities for service delivery, build internal capability, share learnings more widely and adopt new ways of working to support wider organisational change. In reality, this was a daunting, and at times conflicting objective to deliver in the space of one 'lab' programme for both participants and delivery partners alike.

**Based on these programme learnings, we share some recommendations about how to fund and deliver future 'lab' programmes to support infrastructure organisations in becoming better 'fit for the future'.**

**01 Continue funding infrastructure to support change.** Largely reliant on unpredictable revenue/ programme grant funding, we recommend continued allocation of core funding to infrastructure bodies, particularly those with still largely nascent trading incomes. We also recommend working closely with these organisations to understand their funding needs, ensuring appropriate funding to support internal resourcing (including digital and project management resource), funding for external support, and the start up funding required to invest in start-up costs for future technology (or at least a long enough trial/implementation period).

**02 Define clear, shared and achievable programme outcomes**. Whilst supporting 'renewal' and 'relevance' for infrastructure is a valid ambition, it speaks to a multi-year change process for some of the infrastructure organisations that participated in the design lab. Many organisations are still working to develop their strategic role in their sector, or need support developing appropriate organisational structures, cultures, governance mechanisms, and ways of working before considering what products, services, and internal operations would support them to become 'fit for the future'. In the future, TNLCF should work alongside each infrastructure organisations to identify appropriate and realistic outcomes for participating in a funded support programme based on their current stage of development, enabling greater transparency and alignment across the IDL. The learning also suggests further work upfront to build consensus on the process and value of a co-design/ development process and what role each actor will be playing (including TNLCF). This may help overcome some of the uncertainties experienced at the beginning of the design lab.

**03 Include a scoping phase before delivery.** In order to better match up participating organisations with the right combination of delivery support, we suggest supporting a scoping phase before programme delivery. This scoping phase would help surface needs, and ensure that infrastructure organisations are put onto a relevant programme of support based on their stage of digital maturity, or shared need. We would then recommend the team who helps scope support needs, helps facilitate the matchmaking process between participants and delivery providers. We also suggest this scoping team helps organisations to effectively resource and prioritise the programme internally before any programme delivery begins.

**04 Ensure strong rationale for a cohort.** Whether based on place, organisational type, or development stage, in the future it would benefit the overall effectiveness and efficiency of the IDL by having a cohort with similar underlying characteristics that can help build the use case for working more closely with each other and engaging in one-to-many support. We found that organisations engagement with peer/shared learning was highest when they'd had similar experiences or could relate to similar organisational barriers.

**05 Develop an Iterative funding & delivery model.** As a convening partner, Shift often had to balance managing a fixed budget determined at the beginning of the programme with emerging needs surfacing from infrastructure organisations. In the future, we suggest the scoping and/ or convening partner works closely with TNLCF after the scoping phase to determine a more appropriate indicative budget based on each organisation's goals and costed proposals from selected delivery partners. We also suggest TNLCF works closely alongside any convening partner to ensure ongoing contingency is in place to fund additional support on a case by case basis.

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# 02
# Programme overview

An overview of the established design lab, participants, and timeframes

# Aims of the IDL

The established infrastructure design lab aimed to support organisational redesign and renewal; strengthening and renewing infrastructure to be better fit for the future and able to support network members for the long-term. As a result, we'd learn about what kind of resource and support infrastructure organisations would find most valuable.
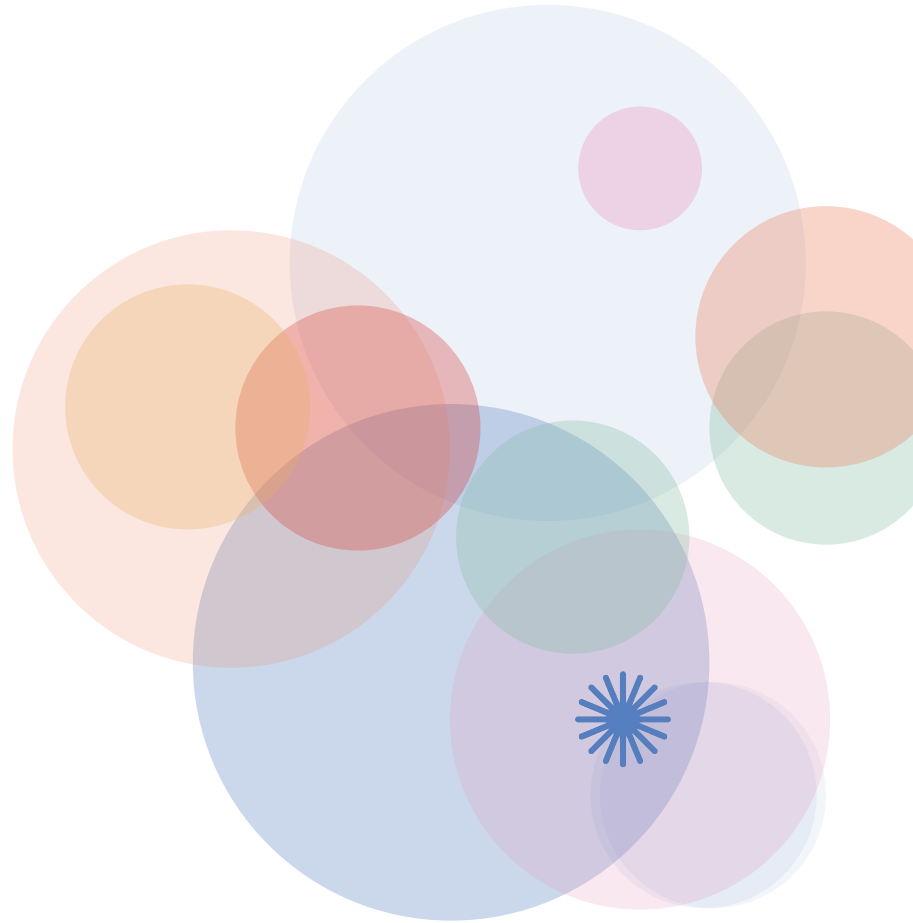
# Infrastructure participants

Seven infrastructure organisations across the UK were selected to be a part of the programme, working on a range of initiatives, serving charitable organisations via a range of different products, services, and wider influencing activity.

**VONNE**
*Case study*

**ACRE**
*Case study*

**NACCOM**
*Case study*

**GCVS**
*Case study*

**NFYFC**
*Case study*

**CAVS**
*Case study*

**CTA**
*Case study*

# Infrastructure delivery team

Shift partnered with a consortium of core and supplementary delivery organisations, who were key to providing the broad range of knowledge, expertise, and different delivery methods utilised throughout the programme of support.

*Core lab delivery partners*

*Contributing partners*

# The programme on a page

| | 2021 / Mar - Apr | May - Jul | Aug - Sept | Sept - Dec | 2022 / Jan - Apr | May - Jun |
|---|---|---|---|---|---|---|
| **Phase** | Delivery partner set up | Programme design | Scoping and finding focus | Project and programme delivery phase 1 | Project and programme delivery phase 2 | Wrap up and planning / Final reflections and learning |
| **Programme** | Design lab partners session / Workshop prep with partners / Session with TNLCF to confirm objectives | IDL - introduction workshops x 3 / Programme kick off and coach pairing | Ongoing scoping and project definition | Reflection sessions with delivery partners x 2 / Reflection sessions with cohort (individual) x 3 | Delivery session to agree programme iterations based on feedback | Learning interviews / Organising follow on support / Report writing |
| **Training** | | | | IDL- Data 101 / IDL - Digital Prototyping / IDL - Design Thinking 101 / IDL - Community Engagement | IDL- Data 101 / IDL - Digital Prototyping / IDL - Design Thinking 101 / IDL - Research Training, Practical Session | |
| **Peer learning** | | | | Shared show and tell | Peer learning sessions x 3 | Shared show and tell |
| **Project delivery** | | | Develop project brief / Sign off project brief | Deliver support / Re-scope into 'sprint' based mini-projects | Deliver support | Support planning post programme |

# 03

# Understanding the role of infrastructure

An overview of the four 'archetype roles' that our cohort of infrastructure organisations provide their sector.

# Four archetypal roles of infrastructure

Infrastructure organisations play essential roles across sectors within civil society. Within our cohort, this varied from community transport to supporting migrant and refugee accommodation provision, as well as wider voluntary services to the VCSE sector more generally. Infrastructure organisation's geographical reach was either regional (like VONNE in the North East) or national in scope (like ACRE who cover all of rural England), often determined by their desired impact goals and charitable missions.

Member representation is often embedded within infrastructure governance structures (e.g. member trustees, federated structures) to ensure lived experience is reflected in decision making and supported throughout ongoing implementation and general organisational development. The strong levels of representation within the networks and governance structures (and at times within delivery teams) of infrastructure organisations, provide the following enabling characteristics;

a) access to long-term trusted relationships in the sector to generate a sustained network

b) opportunities to surface sector need; offering cost effective, tailored support that would otherwise be non-viable without infrastructure coordination

c) an independent voice, providing largely neutral (e.g. within the membership) or representative (e.g. external to membership) convening and influencing activities on behalf of the sector.
These enabling characteristics allow infrastructure organisations to provide meaningful support roles. Despite a range of different governing structures, issue areas, and types of provision given, we've identified four core archetypal roles our cohort provided across the VCSE sector:

✳ **Network conveners**

✳ **Capacity builders**

✳ **Service providers**

✳ **Collective voice**

Our cohort focused on at least one and often all four of these roles, delivering them through a range of different products and services for their respective members and wider beneficiaries. Whilst each of these roles are distinct, there is often an overlap in the technology and capabilities required to deliver these roles effectively - making a strong impact case for continuous, organisational improvement. The following section shares more about the four roles, how they can be delivered via a range of products and services, and the associated technology and capabilities to support role delivery.

# 01 Network conveners

**The network convener role provides "essential infrastructure". They offer their network access to sector-specific information, forums to build partnerships and new opportunities, and dedicated resource to help organise, develop and sustain networks. The network convener is the core role played by most infrastructure organisations in our cohort.**

Things that typically help infrastructure organisations to play an effective network convenor role include:

- Membership platforms with shared resources
- Online billboards
- Service directories
- Newsletters and ongoing social media publishing

For those organisations exploring 'renewal' within this role, the following priorities emerged:

- Building effective, online membership platforms (sign in, member profiles, tiered payment structures based on usage)
- Tailoring comms to different member types
- Automating existing information processes to maximise their efficiency and impact
- Better collection and storage of members' information (e.g. CRM systems)
- Interpreting data to understand how services could be improved or adapted for members

**The diagram on the next page shows a non-exhaustive range of digital-related capabilities required to effectively provide this role.**

# 01
# Network
# coveners

The network convener role provides "essential infrastructure". They offer their network access to sector-specific information, forums to build partnerships and new opportunities, and dedicated resource to help organise, develop and sustain networks. The network convener is the core role played by most infrastructure organisations in our cohort.

- **Role: The core value provided in the sector**
- *Offers: Products or services used to deliver that role*
- *Tech used : platforms or products to help deliver on the multiple offers*
- ***Required capabilities: Organisational capabilities required to enable the delivery of the differing offers***



Required capabilities

Tech used

Offers

Data collection

Data presentation/sharing

Data governance, policies & ethics

Data storage

Data analytics

Website integration

Website analytics

Website development

Website management

Social media

Automation tools/platforms (eg. Mailchimp)

Newsletters

CRM

Database

*Role:*
**Network convener**

Membership platform

Online directories

Integration tools

Website

Web app (eg. login)

"We're an infrastructure organisation providing advice and support for any third sector organisation in our area, from the smallest group wanting to set up right through to national partners."

IDL cohort member

# 02 Capacity builders

**The capacity builder provides services that aim to increase organisational capacity amongst network members. This includes identifying support needs, selecting cost-effective delivery methods, and providing services (either through outsourced provision, or by providing services in-house).**

Things that typically help infrastructure organisations to play an effective capacity builder role include:

- Providing training (either in-house or outsourced)
- Shared resources and/or toolkits
- Peer learning sessions
- Facilitated events.

For those organisations exploring 'renewal' within this role, the following priorities emerged:

- How to best identify capacity needs across membership, particularly with an aim of delivering services remotely.
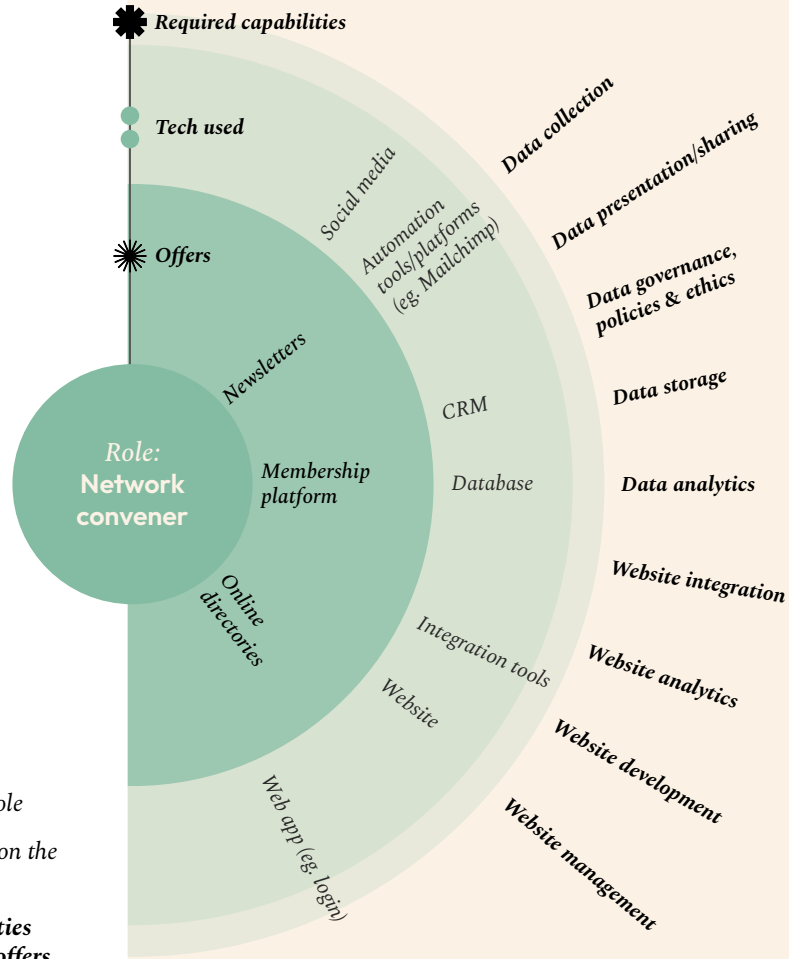- How to best meet capacity needs across membership remotely, whether through online training or virtual workshops and webinars

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# 02
# Capacity builders

The capacity builder provides services that aim to increase organisational capacity amongst network members. This includes identifying support needs, selecting cost-effective delivery methods, and providing services (either through outsourced provision, or by providing services in-house).

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**Required capabilities**

**Tech used**

**Offers**

*Role:*
**Capacity builder**

In person training

Facilitation workshops

Performance audits/ reviews
dashboard/ reporting

Toolkit/content design

Comms delivery

Collecting feedback

Event management

Webinar platforms

*Online resource libraries*

*Community platforms (eg. Facebook, Slack, Discord)*

Selecting online learning platforms

Online courses

Online toolkits

Website

Event applications (e.g. Eventbrite)

Web app (eg: login)

Developing training content/ learning curriculums (learning design)

Facilitation Skills

User research

Website management

"Each of the organisations we work with have a specific focus with on supporting rural communities with their own unique characteristics. But there are often commonality in the services they provide. So we see one of our aims as bringing them together to share best practices and experience."

*IDL cohort member*

# 03 Service provider

**The service provider has actively identified a gap in service provision not effectively covered by public, private, or other third sector services. As a trusted actor in their sector, they help form the right combination of partners to scope and source funding develop new services to fill gaps, provide efficiencies, and improve the sector as a whole. This role often complements wider the efforts of the network convenor and/or the capacity builder.**

Services in this space will vary based on sector need. Some examples, identified throughout the IDL include:

* Providing a volunteer management platform
* Developing an online recruitment service
* Offering tailored consulting services beyond standardised training

For those organisations exploring 'renewal' within this role, the following priorities emerged:

* Understanding the 'problem' space
* Identifying and testing a range of digital (or non-digital) solutions
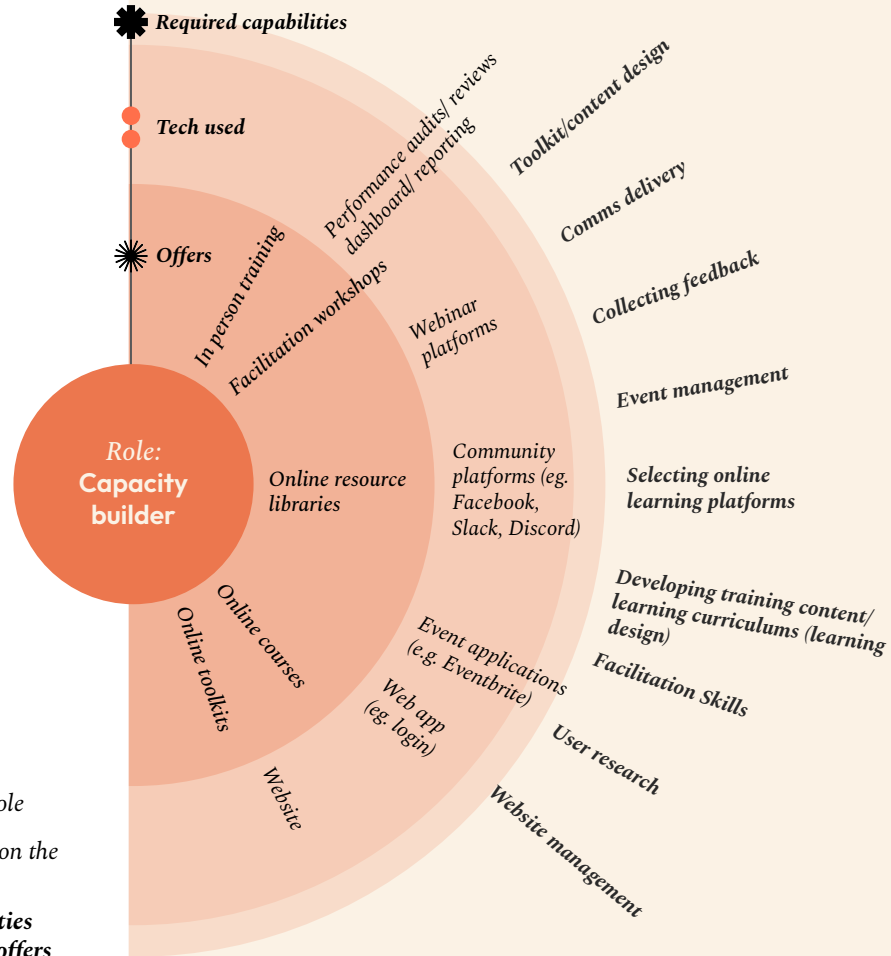* Understanding the required internal competencies, structures, and processes to deliver new services

**The diagram on the next page shows a non-exhaustive range of digital-related capabilities required to effectively provide this role.**

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# Service provider

The service provider has actively identified a gap in service provision not effectively covered by public, private, or other third sector services. As a trusted actor in their sector, they help form the right combination of partners to scope and source funding develop new services to fill gaps, provide efficiencies, and improve the sector as a whole. This role often complements wider the efforts of the network convenor and/or the capacity builder.

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**Required capabilities**

**Tech used**

**Offers**

*Role:*
**Service provider**

Web apps

VCSE Funding platform

Customer CRM/ Management tools

Product development and testing

Product management

Job board/ recruiter

*Performance audits/reviews dashboard/ reporting*

Technology selection and procurement

Governance audits

Volunteer recruitment

Community platforms (e.g. facebook, slack, discord)

Customer service

Product/service design

User research

"Developing this service is an evolution of something we've always wanted to do and the pandemic has really shown the need and we've now got Local Authority buy in. We've seen various iterations of this that others have been involved in the past, and I'm in the process of getting their learnings before we look to launch a new version of the platform."

*IDL cohort Member*

# 04 Collective voice

**The collective voice is often trusted to represent their member network. This is with the view that they are able to understand the collective needs, perspectives, and influencing agenda of a wider sector or broad audience base.**

Services in this space will vary based on sector need. Some examples, identified throughout the IDL include:

- ❋ Representing sector bodies in public / private sector forums
- ❋ Leading policy calls
- ❋ Influencing campaigns
- ❋ Providing sector-level data or research to support collective evidence building

For those organisations exploring 'renewal' within this role, the following priorities emerged:

- ❋ Collecting and synthesise information, knowledge, and data from their membership body to support their wider influencing agenda
- ❋ Identifying the best way to deliver their influencing agenda online - whether through campaigns and wider communication efforts

**The diagram on the next page shows a non-exhaustive range of digital-related capabilities required to effectively provide this role.**

# 04
# Collective voice

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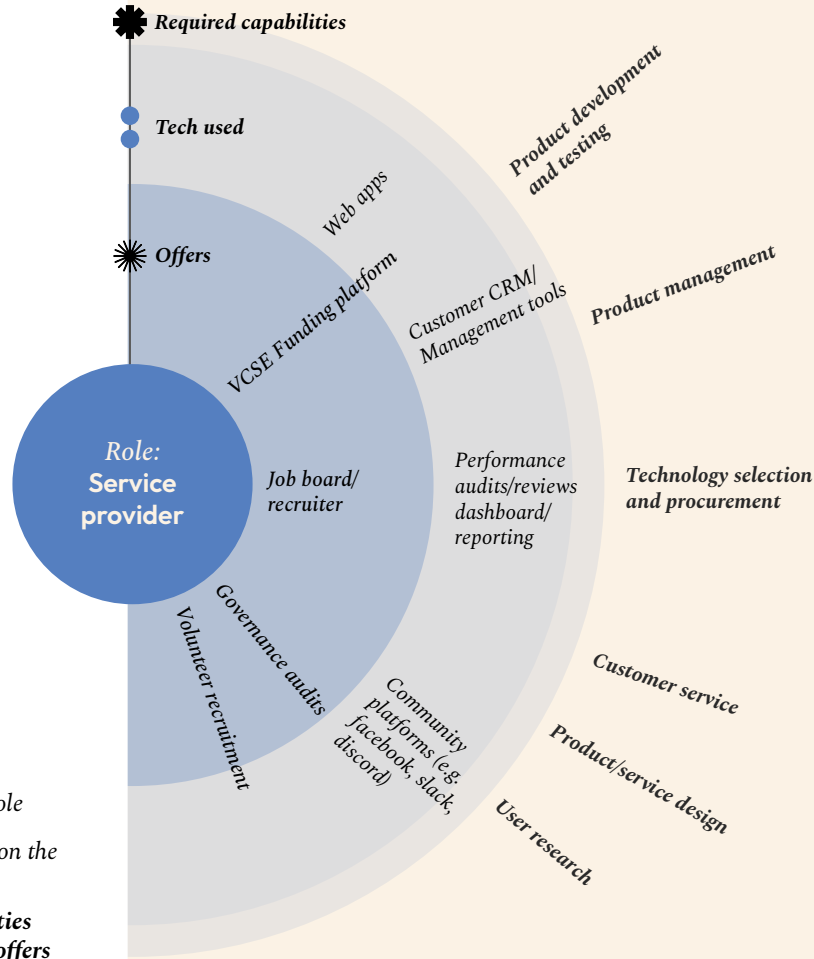
**Required capabilities: Organisational capabilities required to enable the delivery of the differing offers**

***Required capabilities***

***Tech used***

***Offers***

*Role:*
**Collective voice**

Online platforms/ web apps

Comms delivery

Campaign design

Sector surveys

Public dashboards/ evidence hub

Dashboards/ shared data sets

Data collection

Data presentation/ sharing

Influencing campaigns

Campaign management software/ automated comms tools

Data governance. policies and ethics

Data storage

Policy consultations

Research analysis/ management

Research design and synthesis

Online publications/ reports

Open research platforms (e.g. notion)

Survey design

Online surveys
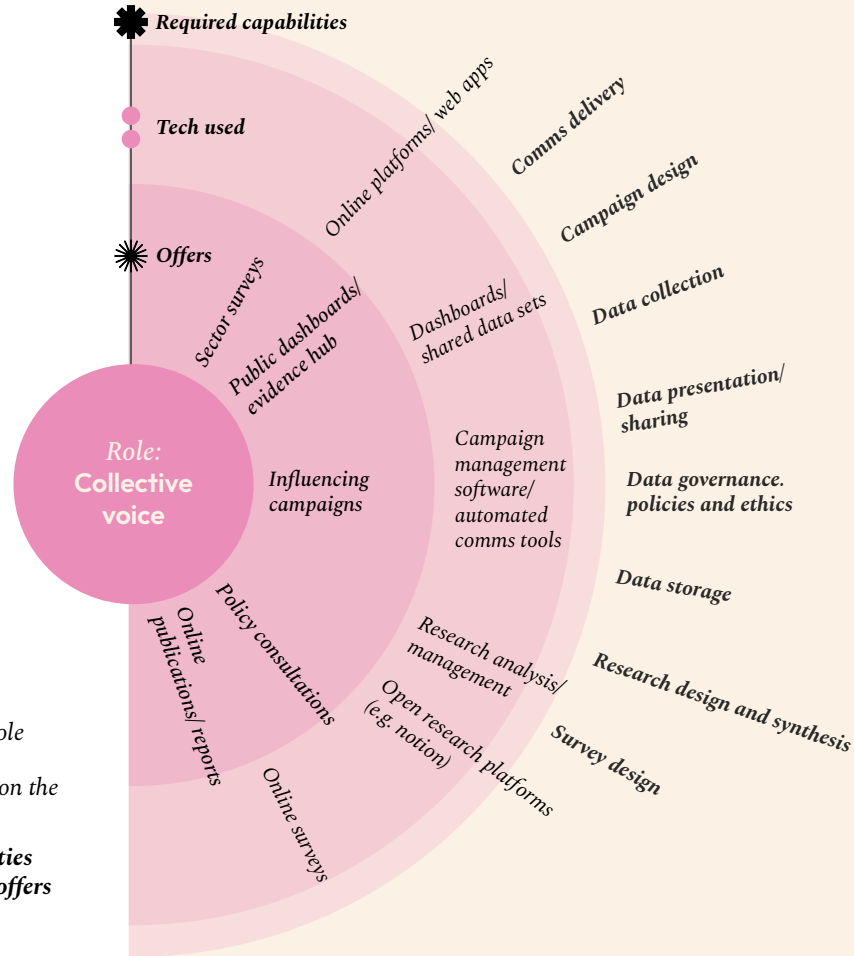
"When it comes to demonstrating your value, it helps to have trust and understanding with your partners. We've put a lot of time and effort into ensuring information between our members and sector bodies goes both ways, so we give feedback to the sector about what we are hearing from strategic bodies and also have mechanisms and networks to properly represent different member organisations. This has helped us build trust across the third sector and regional bodies, and we're now focusing our efforts on further devolving representation to our members within our influencing and partnership work."

*IDL cohort Member*

# 04

# Emerging conditions for renewal

Based on the roles provided by infrastructure organisations, this section provides a brief overview of the foundations that support internal change, alongside the ongoing pressures and barriers that we heard from infrastructure organisations that can serve in holding them back.

# Building the determinants for change

Based on our learnings via delivering a lab with our first cohort, we've identified three determinants that can help infrastructure organisations to become more flexible and responsive to their member networks.

**01 A culture of continuous learning:** Infrastructure organisations need mindsets, skills and rhythms in place to understand the ever changing needs of their members and wider network. Continuous listening and learning enables them to respond by adapting their offers based on emerging need or changing landscape of service provision. Some infrastructure organisations currently rely on this learning from their Board, annual general meetings or surveys; which can lead to small samples or datasets, limiting confidence in what offers to prioritise.

**02 A clear strategic role:** With an understanding of the needs of their members and wider networks, infrastructure organisations can make a confident choice about the role (or combination of roles) they want to play and therefore how they add most value to their network. This focus will help them make strategic decisions about the offers or services they want to invest most time, money and resource in, as well as the internal capability and technology they need to enable them.

**03 Adaptive capacity and mindset:** In order to effectively 'renew' organisations need a range of core competencies, open, inclusive mindsets, and systems and processes in place that support ongoing adaptation and improvement. This would ensure they are continuously evolving how to deliver their strategic role(s), ensuring that they have the right internal skill sets and capabilities to maximise desired impact

The first two capabilities are particularly important to make sure infrastructure organisations don't commit to transformation in a 'vacuum', where organisations risk using and investing in trends such as digital for 'digital's sake' or trying to provide new products/services without understanding who they are for and why they are best placed to deliver them. First and foremost, digital, design, and data must be fit for purpose. We share the implications for funding and programme design in the 'recommendation' section of this learning report.

# Core capabilities to enable change

In order to build on the determinants for change, we've been able to identify a number of enabling competencies that support organisations in continuous learning finding focus in their role,  and building adaptive capacity as an organisation to continuously respond and improve service provision. The following diagrams highlights some core capabilities that can help deliver on these determinants, alongside the common enablers and organisational barriers identified throughout
 the programme.

**Flexible, adaptable, structures, systems, and processes to enable change:**

Enablers     Barriers

*Systems that allow staff resource to share knowledge, information, and achieve desired tasks*

*Inconsistent design or development processes*

*Limited resource to support cross-functional learning*

*Internal resource focused on continuous and improvement*

*Digital transformation silo'd into a 'comms function'*

*Clear roles and responsibilities across management teams and governance structures*

*Relevant design and delivery processes*

*Governance structures focused on domain knowledge with less exposure/ expertise or interest relating to digital*

## Open and adaptive mindsets and organisational cultures:

Enablers | Barriers

*Continuous improvement mentality*

*Risk aversion towards 'test and learn' mindsets*

*Willingness to explore/ test new initiatives*

*Capacity to invest in reflection and 'learning' activity*

*Openness to external perspectives and ongoing feedback*

*Traditional hierarchies or power structures that don't encourage emergent feedback/ bottom up development or resist change*

*Agile/adaptable ways of working*

## Foundational experience/capability to foster change:

Enablers | Barriers

*Research, analysis, and synthesis capabilities*

*Outsourcing digital or capacity development functions due to funding constraints - therefore don't build capacity in house*

*Processes in place to support Programme/ technology assessment and selection*

*Hiring practices based on 'functional' knowledge rather than capacity to lead programmes of change*

*Experience in project management*

*Strategic alignment and stakeholder buy-in*

*Knowledge gaps around what range of skills/ expertise is required to meet organisational objectives*

*Expertise in programme and service design*

## Unrestricted funding to support continuous development:

Enablers                                    Barriers

Enough funding from services to fund
core cost/ cross-functional resource

Enough funding from services to invest
in 'change' based initiatives

Few funders are interested in funding
core work - leads to reliance on scaled
revenue funding, investing in trading
income, or even using reserves (where
appropriate)

Appropriate budget to cover internal
resource, technology expenditure, and
access to relevant expertise

Finding routes to funding that align
with their strategic mission and roles

Getting support from Board members
to invest in change

## Appropriate support networks and access to resources

Enablers                                    Barriers

Access to relevant training/ networks

Existing feedback mechanisms often
rely on basic survey/ annual feedback
rhythms. organisations rarely get
detailed information to support
prioritisation, new ideas or decision
making

Access to relevant expertise via
Boards/ governance mechanisms

Reinforcing echo chambers that are
not representative of user need (e.g.
we're meeting the needs of those who
speak/ seen the loudest). Typically
specific members of staff/ trustees
which means that don't bring in wider
POV/ diversity of voices across
service provision

Relationships with engaged
users/ sector networks

Not understanding how to
appropriately find and engage with
external support providers

Access to appropriate support providers
(e.g. design, development partners)

# Pressures impacting the propensity to change

**Beyond organisational barriers identified, infrastructure organisations also came into the IDL facing a number of external pressures, which would become evident throughout delivery of the design lab.**

**Ongoing impacts of Covid-19.** Organisations were facing challenges finding appropriate resource to deliver on existing, core services. Staff shortages and challenges in recruitment led to increased pressure on internal teams to cover additional responsibilities, often holding one or two additional roles beyond their own.

**Adapting to remote working.** Many of the infrastructure organisations had developed basic digital ways of working throughout Covid-19. For example, some had developed shared/ cloud based document management (e.g. sharepoint, google drive) and improved skills in using digital communication tools (e.g. Zoom and Microsoft). However, organisations felt continued pressure to 'modernise' their internal digital processes and systems to help automate, create efficiencies and better meet the demands of remote working.

**Changes in member behaviour.** For some organisations, pressures revolved around wider trends within their membership base. For example, cohorts were often working with a range of 'user' types, often looking to engage with services via different delivery channels. This had created uncertainty over how to best develop an appropriate 'hybrid' service delivery model that could transition to 'digital first' services and maintain in-person, relational support to serve multiple user needs.

**Limited funding.** Infrastructure organisations have multiple income streams, often balancing business development efforts in securing grant funding from statutory bodies or trusts and foundations with developing income from wider membership fee structures, donations, and paid-for services. However, with continued competition for grant funding, and a sense that 'frontline' organisations were often prioritised for grant funding, infrastructure organisations were increasingly feeling pressure to develop services that could generate regular, sustained, and unrestricted income.
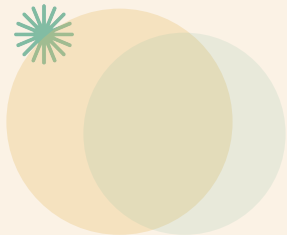
# 05
# Designing a 'design lab'

Based on the emerging contexts about internal and external challenges to change for infrastructure bodies, this section provides an overview of the key considerations and subsequent hypotheses we had in mind when designing a 'support model' for the infrastructure design lab.

# Early tensions in proposed delivery approach

**The 'immersion' phase of the programme surfaced a broad range of organisational support needs, immediately challenging the initial assumption that we could deliver a 'cohort' model of programme support.**

**Impact on infrastructure.**
Infrastructure organisations within the cohort were loosely segmented by The National Lottery Community Fund as 'established'. Beyond length of operation, it was unclear what other criteria was used to determine how these organisations would benefit from a cohort, lab-based support model. As a result, participating infrastructure organisations were unclear as to why they'd been 'pooled' together, creating a sense of uncertainty around what a "design lab" would consist of, and what value they'd get out of it.

*"Just because you've called it an infrastructure organisation doesn't mean to say you're the same as any other infrastructure organisation. And that was difficult for everyone to understand what the design lab was, and understand why all these other organisations were involved together wasn't clear."*

*IDL cohort member*

**Impact on delivery.** Early conversations with cohort organisations identified infrastructure organisations at various stages in their strategic development cycle, with a diverse range of goals, priorities, and expectations about support they'd receive. For delivery organisations thinking about how to best provide support, this made it challenging to know how each delivery partner would be able to add maximum value across the support lab.

*"It almost felt like initially, we started trying to design something based on what we could offer as a partnership. And then we spoke to infrastructure organisations, and it didn't quite line up. So we did something different. It felt strange that TNLCF put together a cohort of infrastructure organisations, and we put together a group of delivery partners separately without reference to each other. Really, the partnership should have come after an understanding of the needs of the cohort."*

*IDL delivery partner*

# Pivoting our model of support

**With such broad organisational priorities, support needs and expectations across the cohort, we adapted with a new approach to programme support and timeframes for programme delivery.**

**Tailored, dedicated support.**
Without consistent needs to respond to or organisations at a similar stage in a design process (e.g. testing solutions), we identified early that our programme support model would need to be tailored and flexible for each organisation's distinct and often still emerging priorities and needs. A tailored and flexible approach was important to help make the most of the resources available from delivery partners. Our initial model focused on offering a range of support to each infrastructure organisation in the cohort (assuming strong overlap and consistency in need and priorities).

However, once we identified such a broad range of needs, we adapted from the initial model of a 'curriculum' based delivery model to a 'tailored' model in order to make the most of delivery partners skills, resources and preferences when supporting the cohort. This scoping period also helped us identify gaps in the skills of delivery partners, which led to Shift onboarding two additional delivery partners for specific project work (Dot Project, Core Insight).

**"I felt a bit like when I first joined [the IDL], we didn't really know what we were doing."**

*IDL cohort member*

**An extended scoping period.** The broad range of priorities written in funding applications and our introductory conversations with infrastructure organisations highlighted the need for extended time to help organisations surface and build consensus on their priorities and goals for the design lab.

The initial immersion phase identified a broad range of priorities, which were often in contrast or in addition to what was outlined within the funding application. Early discussions surfaced barriers for cohort organisations to easily express, frame and translate needs (e.g. we need data support) into actionable activities to receive support from the design lab (e.g. a data audit, data policy reviews, data analysis and synthesis support). This would support previous learning on funded capacity support programmes (e.g. Beyond) that organisations struggle to surface and identify their needs in order to easily access and actively engage in external support or develop effective project plans/ roadmaps. This scoping period allowed us to transition the focus of broader design lab intentions into more specific activities and desired outputs, whilst also giving infrastructure organisations a sense of what was required internally in terms of budget, resource, and capacity associated with taking part and making the most of support on offer.

"The proposals were very, very high level. And what we had about infrastructure organisations was often out of date by the time we first spoke to them"

*IDL delivery partner*

# Core capabilities to enable change

**Based on the tensions that surfaced during the initial set up and scoping phase, we developed a new programme delivery model. This model was underpinned by a number of 'hunches' on how we could best support organisations to be better 'fit for the future'.**

**Overarching hypothesis:** We believe that for infrastructure organisations to become 'fit for the future' the Design Lab needs to provide a combination of support that is tailored, project-based and relational. Tailored because each organisation has unique goals and starting points. Project-based because working on live problems will allow for cultural or organisational

issues that can block change to surface which we can provide support for. Relational because feeling supported by same people over time allows for trust to be built and brings accountability and expertise for goals to be achieved.

**Our model consisted of six key support components in order to test our hypothesis.** The rest of this section shares more details about each component of support.

**01**
A live project

**02**
Co-designer support

**03** Access to resources and specialists

**04** Experimentation with digital tools

**05** Access to foundational training

**06** Peer learning opportunities
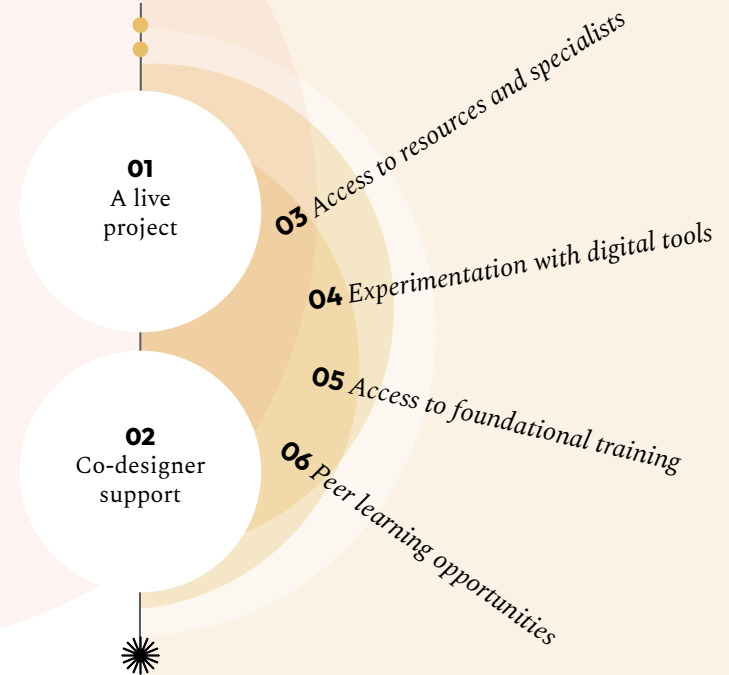
# The core of our programme support model

**At the centre of our support model was shaping our support around a live project for each infrastructure organisation, with two co-designers dedicated to each organisation to help them make progress on delivering the project.**

**01**

**A live project.** Each organisation would work on a live project with clear goals, activities and desired outputs by the end of the design lab support. This was designed to help build team alignment and focus so the infrastructure org team and co-designers can work together with a shared purpose towards a shared goal. It was also designed so that organisations could access support to any internal barriers surfaced through project delivery.

**02**

**Co-designer support.** Each organisation would be matched to a pair of co-designers throughout lab support. Co-designers are there to build trusting relationships and support infrastructure organisations towards their goals. The duo intentionally combines a digital, design or data 'doer' to help get things made and tested, along with a specialist in collaboration to work through resistance and support inclusive change.

"We are doing this because we believe that organisations are most effective when aligned around a shared purpose and working towards a tangible goal. This will give us a chance to make sure the seven infrastructure organisations can get things built and work in real-time through any internal barriers to change they might be facing."

*Introducing the Infrastructure Design Lab*

# Providing access to additional support

**03**
**Access to foundational training.** The IDL would provide access to foundational training throughout the duration of support. This was designed to help address any internal knowledge or competency gaps related to design, data, digital, and organisational change. Training would be suggested based on the needs of each infrastructure organisation and tailored where possible**.**

**04**
**Access to resources and specialists.** The IDL provided each infrastructure org with access to flexible 1:1 advisory calls. This was designed to provide any additional specialist expertise required beyond what co-designers could offer, helping to progress towards project goals. There was also a resource bank set up, aimed at sharing relevant templates and frameworks surfaced throughout the design lab, designed to increase opportunities for participants to build better practice and adopt tools/ resources more widely across their organisation.

# A peer network and use of digital tools

**05**
**Peer learning opportunities.** The IDL would provide opportunities for resource sharing and ad-hoc connections. Additional peer learning opportunities were to be convened by co-designers to make relevant connections based on shared tasks or problem experienced during lab delivery. We also scheduled two lab-wide reflection sessions at half way and towards the end of delivery.

**06**
**Experimentation with digital tools.** The IDL provided each cohort organisation access to digital communication and design tools such as Slack, Miro, Zoom, and Calendly throughout the design lab. This was designed to encourage practice, safe experimentation and allow participants to explore the potential value and fit for wider adoption within their own organisation.

# 06

# Benefits and emerging outcomes of the IDL

The following section shares more about the benefits experienced from participants as a result of our support model, which serve to validate some of our assumptions within our support hypothesis.

# A live project

Focusing on a specific project offered co-designers an opportunity to learn about the wider contexts of the organisation, help address barriers, keep the organisations on track, and support with future planning.

**Address internal barriers to change.** Focusing in on a clear project allowed the design lab team to engage with the organisational realities, internal processes, capacity, and skillsets of the organisation. Throughout the project, this included changes in resourcing/ personnel regarding the project, encouraging senior engagement/ buy-in, challenges in 'recruiting' to provide feedback, as well as getting additional funding or resource internally towards sustaining initiatives.

**Keep on track.** Organisations found it helpful to refer back to their design lab goals and have consistency with individuals to be held accountable as they went through project delivery. Co-designers often found themselves providing an additional 'project management' role to ensure that appropriate milestones were hit within desired timeframes and project budgets.

*"We never usually get regular and focused meetings. There is always something else that steals the time. Using the membership as an example, so many times over the years that was the plan then something else creeps in and takes that time. Having these meetings in the diary gives us that time to focus on it. Nothing else can take over. It's a priority."*

*IDL cohort member*

**Support future planning.** Having a detailed understanding of the organisation allowed co-designers to work closely with the project team to develop an implementation plan to help sustain the progress made during the design lab. This was particularly important for those organisations working on goals that required continued activity after the design lab ended (e.g. embedding CRM processes, behaviours etc.)

# Co-designer support

**The relationship with co-designers was consistently considered the most 'valuable' aspect of the design lab; a product of ensuring effective matching, safe and trusted project team development, and an adaptable approach to providing support.**

**Providing relevant expertise.** Almost all of the cohort felt that they were matched with the right co-designers to support them towards their project goals. Co-designer expertise ranged from research, design, and data 'consultancy' expertise, through to mentoring, coaching, and wider experience supporting organisation and culture change.

**Creating space.** Infrastructure organisations reflected that by having regular catch ups created the space to ask questions which created 'learning moments' regarding current/ live tasks and activities. This helped to clarify assumptions regarding the design process, helped 'unblock' challenges to making progress, and created a supportive critical friend to help challenge dominant ways of thinking or 'norms' within the organisation.

**Building trusted relationships.** Infrastructure organisations often found the co-designer relationship created the sense of a 'project team', working together on a common objective, with shared leadership, collaboration, and ownership. For the cohort members able to build consistent relationships, they felt they could be more honest about progress made and how to best make use of the project team's time and resource.

**Adapting support approach.** Infrastructure organisations consistently reflected that the co-designers were happy to adapt their pace as and when needed, particularly when existing organisational priorities took precedent.  Organisations highlighted this was particularly important because the length of the design lab meant there were periods of tight capacity which would impact their ongoing engagement with support.

*"I think they used their expertise wisely. It never felt like it was too much or too full on. It felt like they were taking us with them. The Miro board we created was complex and impressive to look at but didn't feel overwhelming. We would have never been able to do those things without them."*

*IDL cohort member*

# Foundational training

**The training provided 'learning moments' for participants, with a range of foundational content and opportunities to practice during live 'workshop' type sessions.**

**Appropriate content.** Feedback from the training suggested they provided important theory, relevant examples, and moments for shared interaction and reflection between internal teams and the wider cohort. Training modules focussed on data strategy, foundational research, design, prototyping, and communication strategy. Our training feedback would validate that training is an important and necessary component to support increased knowledge and confidence within teams, particularly when there are perceived skill gaps in delivering organisational change.

**Interactive 'workshops'.** A particularly important component to all the training was ensuring that the methods shared were at 'the right level' and there was space within the sessions to 'workshop' real world applications to help participants identify use cases for the training in their day-to-day roles.

**"The training we've done has forced us to have much more in-depth reflections as a team. Now we've almost gone back in order to go forward, because we've decided to resource more staff to work with us through the design lab."**

*IDL cohort member*

**"The digital prototyping training was simple, but it was effective. Because it showed how you can use something as simple as Google Slides. I would never have conceived that you could actually use that to develop something quite advanced. And it's just such a simple tool. I think that's what's been a positive aspect of it. Some simple tools that can be used in really effective ways. And a lot of the training has highlighted that for us."**

*IDL cohort member*

# Experimenting with digital tools

**Throughout the design lab, participants were given a number of opportunities to test out digital tools. Experimenting with tools was considered most effective when tools were introduced with relevant support (e.g. how to) and were timely to 'live' project tasks.**

**New communication tools.** Organisations were able to identify potential use cases for **Slack**, particularly considering community building efforts with their members. Using shared documents and 'rolling notes' from meetings, also showed the benefits of open-access documents and tools.

**Digital whiteboards.** Whilst **Miro** was considered a steep learning curve for some of the participants, many reflected that it was useful to be able to see how whiteboards could be used across a range of different use cases that opened up varying possibilities about applications for existing services, particularly when engaging with internal staff or their members in virtual workshops.

**Reusable templates.** Providing templates, often adapted by co-designers for specific use cases was also considered beneficial, and often made it easier to utilise previous training and previous discussions had with co-designers.
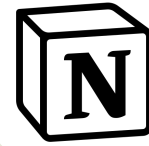
# Peer learning support

**Throughout the design lab, participants were given a number of opportunities to test out digital tools. Experimenting with tools was considered most effective when tools were introduced with relevant support (e.g. how to) and were timely to 'live' project tasks.**

**Shared experience.** Organisations were able to identify potential use cases for slack, particularly considering community building efforts with their members. Using shared documents and 'rolling notes' from meetings, also showed the benefits of open-access documents and tools.

**Live/ shared examples.** Whilst Miro was considered a steep learning curve for some of the participants, many reflected that it was useful to be able to see how whiteboards could be used across a range of different use cases that opened up varying possibilities about how they could use them within their existing services, particularly when engaging with internal staff or their members in virtual workshops.

**Safe spaces.** A wider theme surfaced through regular reflection sessions with the cohort, was how individual and group sessions felt like a safe space to ask questions, and share what was and what wasn't working throughout support. As a result, we were able to become more responsive as a lab, adapting and tailoring our support regularly throughout.

# Emerging outcomes from the design lab

**Whilst still early to understand whether longer-term change organisational change will result from the programme support, this section shares five emerging outcomes the design lab contributed towards.**

**01 Progress on project goals.** All of the infrastructure organisations we spoke to by the end of the IDL's support felt they had achieved or were 'on track' to achieve their 'project' goals outlined for the design lab. **Click here to access** our cohort case studies and read about each organisation's progress on the design lab.

*"We said was at the very least, we'd like to get to the stage where we had a fairly solid development brief, and we have absolutely achieved that. So we've got to a point where it feels like a really nice comfortable end point."*

*IDL cohort member*

**02 Increased focus.** Several organisations focussed on learning about their members' needs, uncovering barriers their members might encounter when engaging with support and how important it is to meet members where they are. The design lab set organisations up with an understanding of both the value and practicalities of doing research themselves - leveraging both user research conversations and data, with team building skills and confidence to progress independently with both.Improved understanding of member needs gave some teams the clarity of focus / purpose they needed to

projects, for example briefing external developers or adapting their communications with members.

*"So we just got loads of really useful feedback, particularly around thinking around how to communicate our service offer better. How we might be able to engage members even more by segmenting our service offer depending on their different services and regions or any other ways to segment them like that."*

*IDL cohort member*

**03 Increased knowledge in delivering 'digital' change.** Most teams reported an increase in their confidence in facilitation, user research and the design thinking process, and capabilities for understanding what their members want, shaping design briefs and data strategy. They felt their learning was supported by direct involvement in the work they were doing with co-designers contrasted to outsourcing work to a consultant.

Throughout the design lab, teams found their assumptions challenged through training, work with co-designers and research conversations with members and other stakeholders.

Over time, this led to shifts in mindset, for example, towards thinking before acting and testing ideas before rolling them out in full. Teams saw the value of new processes, particularly the value of understanding members' perspectives and getting their feedback on new ideas and initiatives, particularly the value of understanding members' perspectives and getting their feedback on new ideas and initiatives.

*"We found it important that you didn't just go away and do the work. We've just been in a meeting talking about a new project and were talking about the new processes we've learned from the design lab and how we can use them for the next piece of work. So I think it was important that it was done like that rather you just doing it for us."*

*IDL cohort member*

**04 Changes in organisation structure or resourcing.** Another emerging outcome of the design lab has been changes to resourcing and team structure. VONNE in particular have restructured their team so Member Services is its own function, encompassing digital which was previously siloed in Comms. The team will be supported by a new Data Officer role with a focus on understanding the organisation's data better to serve an improved member experience. Other organisations (e.g. GCVS, CTA) have extended specific posts to ensure that post-design lab 'implementation' plans can be successfully embedded into the organisations before considering what longer-term resourcing requirements might be needed.

"Initially, they got an admin person to take over the project when the IDL finished. And they were going to finish resourcing it at the end of March. And now luckily, they've extended resource on the work for another year. Because otherwise she would have had had to carry on doing all of her administrative tasks on top of taking on this project. So yeah, I didn't think they really knew what it takes to actually migrate a database and what it takes to carry on maintaining it. That's what I'm trying to do now is just kind of support them with the reality of what you actually need to do to make this project successful. So yeah, I'm more confident now that it can be sustained."

*IDL delivery partner*

**05 Adoption of digital tools in everyday work.** As a result of experimenting with and utilising a range of different digital tools throughout the IDL, several organisations are now looking to leverage them to support new ways of working within the organisation. For example, one organisation used a polling tool to identify internal needs for remote working. Another organisation is now using slack to test a 'member community'. Having developed an understanding of their potential as part of the design lab (and having free access) organisations have been able to identify opportunities for utilising these tools across the organisation.

"I used a discussion guide for consultations on a piece of work we are doing on flexible and remote working. The format and style was influenced by the design lab. It unlocked some really important conversations for the staff, there is a lot there that has been influenced by the design lab"

*IDL cohort member*

# 07
# Programme challenges experienced

This section explores some of the challenges that both delivery providers and participants faced throughout the design lab, all of which have implications on future funded support programmes for infrastructure organisations.

# A slow and uncertain start

The cohort perceived the extended period of 'immersion' and 'scoping' at the beginning of the design lab as a 'slow start'. The following barriers emerged when seeking consensus across the cohort and design lab during this period.

**Conflicting objectives.** Whilst TNLCF voiced an aim for the IDL to focus on creating outputs or solutions (e.g. building new digital 'things'), in reality, 5 of the 7 participants in the cohort didn't have a clear 'solution' to develop. Most organisations were looking to source stimulus or insight from their members or gain additional expertise in order to make sense or find focus within their existing services. As a result, internal discussions across the IDL delivery team focused on how we would balance designing a model of support that would meet both the cohort's preferences for 'discovery' and still offer some tangible 'solutions' to be tested, as desired by The National Lottery Community Fund.

*"We had an early conversation with lottery where they threw us a bit of a curveball that they wanted quite practical, tangible outputs, which hadn't been a lot of what we'd been talking about to date, which was often quite emergent and exploratory around the role of infrastructure and how that needs to change for the future"*

*IDL delivery partner*

**Limited team decision-making powers.** Individuals on the project team within the design lab rarely held budget or decision-making powers within their organisation. This led to 'back and forth' engagements with senior stakeholders in the organisation based on updated or adapted briefs. Some organisations had to invest in engaging the wider organisation to 'buy in' to their priorities for the design lab. One cohort organisation has to even wait for approval at their quarterly Board meeting before they could actually start lab activity.

**Internal disconnect between bid-writer and delivery team.** Except for 1-2 cohort organisations, the individual who had actually written the brief vs the team delivering the project differed. Some organisations inherited a brief from staff members no longer at the organisation or with completely differing priorities than the project team itself. This highlighted a misalignment across organisations - often a product of who writes funding applications rarely being the same individual as those allocated to deliver 'digital' or 'change' programmes.

Some organisations delayed surfacing their real priorities because they were still conscious of, or felt obligated to deliver what was written in the funding application – often by a more senior member of staff. At times it felt unclear how much flexibility was available within the design lab to support changes in priorities shared in initial funding applications.

'None of us were part of that application process. So when we were presented with with this, we were a bit taken aback, to be honest. And we pushed back. And we kind of said, 'well, no, we can't do this'. We can't do our day to day jobs and do this, whatever this is. So we we came into this process a little bit hesitant, a bit nervous, a bit unsure.'

*IDL cohort member*

**Resourcing the design lab appropriately.** The uncertainty of what the IDL would entail impacted the early resourcing of the programme. Infrastructure organisations experienced challenges knowing who to bring from the organisation to various scoping meetings, who to resource as 'lead' for the design lab work, and how to engage wider stakeholders in the opportunities presented from participating in the design lab. Other organisations had not yet identified any resource to consistently 'hold' or lead on design lab activity – often 'sharing the load' and refining resource as the design lab progressed. Many of the organisations were deeply embedded in their day to day activity and few organisations had the capacity or the structure to easily resource a digital change project.

"My wishful thinking was someone would just give us a product, plug in and off you go. Particularly with a volunteer board, starting to think about data journeys and things like this are complicated and not that fun but important – it's hard to get them engaged in all of this."

*IDL cohort member*

Without previous digital change or digital project management experience, many of the organisations were unaware of the process and internal resource requirements needed to adequately deliver on their programme goals. This speaks to a potential need in the future to support organisations to understand the implications of engaging in a programme focused on digital and organisational change.

**Contrasting digital maturity.**
Another barrier that surfaced at this period was the language used by the varying delivery partners. Whilst some organisations had experience of digital training programmes (e.g. Catalyst 'design hops') many were new to the design processes, with inconsistent 'digital maturity' within teams, often on an individual basis.

This delayed the development of clear briefs, with the need for organisations to 'translate' the language used by delivery partners to ensure it was understood and 'owned' internally, and for delivery partners to translate operational needs into a clear project scope that could be effectively delivered on. For a smaller sample of participants, the additional time spent at the beginning of the programme felt like a wasted opportunity, held back by ongoing conversations in the cohort, focused largely on those less 'advanced' in design and digital processes, tools used to facilitate lab delivery, or unsure of what to prioritise in the IDL.

"For most, if not all of the organisations that were involved in this project, you've probably never found ourselves in the design lab before. So how do you prepare for it? make the most of it? deal with the uncertainty? There are some fundamentals that would have really helped prepare we were starting with a firm footing."

*IDL cohort member*

# Resourcing and optimising project delivery

**Optimising resource, momentum, and capacity was an ongoing challenge in the design lab, particularly to support ongoing project delivery. Efficiently responding to need over the duration of a year was often challenging from a delivery perspective.**

**Maintaining project momentum.**
The initial recommendation was for co-designers to meet with their team on a two-weekly basis to share updates and make progress on specific project tasks. However, co-designers often struggled with the rhythm of meeting with participating organisations. Often meetings had to be rescheduled, leaving limited time to provide feedback on outputs or complete tasks that could help make progress on the project. This would support a wider reflection that 'digital change' programmes are difficult to prioritise, particularly with the existing pressures faced by infrastructure organisations.

**Optimising co-designer resource.**
Co-designers reflected that 1-1 support could be inefficient or constraining. For example, co-designers would often identify additional support needs that had not surfaced during the scoping period, but didn't feel there was flexibility in the model to easily fill these gaps.

Some co-designers wanted to bring in other members from their own team, but felt like they had to hold the relationship. Others wanted to outsource work to other co-designers within the IDL not allocated to their project, who they felt might be a better fit, but didn't want to be perceived as not meeting expectations as a co-designer.

**Adapting support roles.**
Co-designers often found themselves playing additional roles beyond their original tasks in the co-designer relationship. For example, co-designers focused on 'project delivery' often ended up in more of a coaching capacity to support organisational change due to being closer to the issues within the project team. Almost all co-designers played more of a project management role than previously anticipated, a product of limited confidence or resource within the infrastructure organisations to run a digital change project. Co-designers found this challenging at times, with uncertainty over how to best balance their time supporting in ways that didn't necessarily fit their skillset, internal ways of working, or usual approach to delivering value.

*"Agile shapeshifting, while positive, at times felt like failure as a co-designer."*

*IDL delivery partner*

# Convening support across the programme

**The Shift team playing the central 'convening' role experienced challenges in creating the right mix of 'convening infrastructure' for both participants and co-designers to effectively surface and access the range of support available within the IDL. This resulted in 'missed moments' and delays to link up complementary support of the programme. This led to further programme iterations aimed to address these challenges.**

**Clarifying delivery roles.**
Co-designers fed back to the Shift team that it was unclear what level of autonomy was available to provide support for their matched infrastructure organisation, given Shift's wider convening role.

Shift's responsibility for overall budget and programme management served to reduce agency to bring in relevant expertise or additional support when deemed appropriate as co-designers often felt they needed 'permission' from Shift**.**

*"I've been a little bit challenged by decision making and power structures. I've been struggling with who exactly is doing the deciding, who is giving support and exactly what we are signing up to."*

*IDL delivery partner*

**Building connective tissue.** Shift was responsible for supporting 'linkages' designed to help infrastructure organisations access peer support and additional expertise beyond their co-designers. This was conducted via monthly reflection sessions with

co-designers, as well as encouraging cross-communication with the cohort via slack. However, co-designers reflected that it was challenging in these sessions to effectively signpost support without full visibility around what was going on across the IDL, as well as what types of expert support was available given existing budget and capacity constraints. Regular engagement via Slack between infrastructure organisations themselves was limited which may suggest a perceived lack of relevance in sharing across the cohort or capacity to engage in networking/ peer support activities.

*"If we'd realised how valuable that support would have been sooner, we could have perhaps reached out and got that support earlier and done some more practical live examples, because with a lot of our sort of end result from the project, it's been the foundation and the starting point for a lot of longer term work."*

*IDL cohort member*

**Ensuring complementary support aligned with project stage.** With infrastructure organisations each starting at different stages of the 'design process', and with different goals in mind, it was challenging to design and schedule shared training and resources that complemented the cohort's needs at any given time. For example, some organisations ended up attending research training after completing a 'discovery process' or attended prototyping training before having a desired solution in mind. Both co-designers and participants reflected that it would have been more effective to conduct the training in with project delivery.

This had been intended at the beginning of the programme but it was much more challenging to design, schedule, and deliver

training 'just in time'. Better linkages between live training and project delivery in the future, would give co-designers increased opportunities to ensure the training can be applied, sharing appropriate resources, helping to 'workshop' live examples, and creating space for sustained reflection and learning to compound the training's impact.
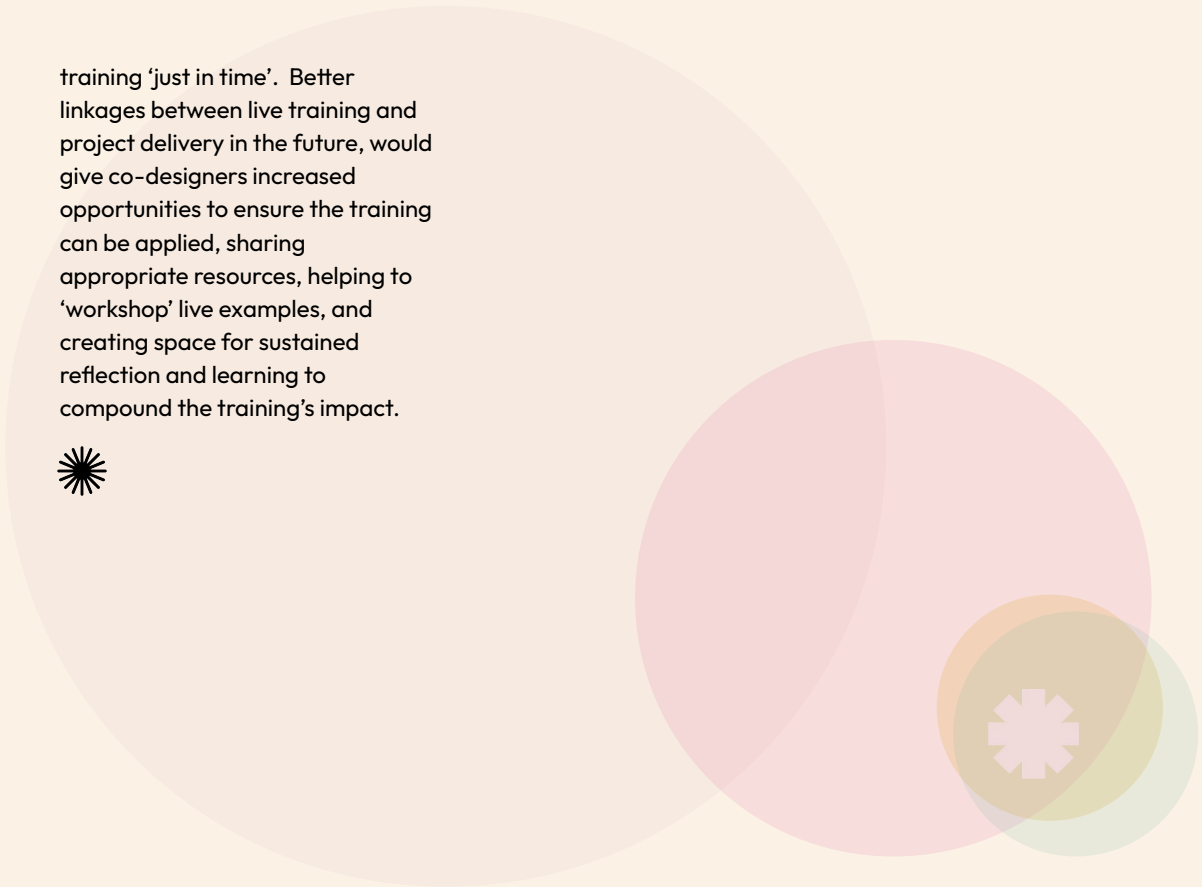
# Pace of programme too fast to sustain

**Cohort members reflected towards the end of the programme that the pace of working on project delivery, engaging with trainings, and building capacity within project teams was often 'too much too fast', making it difficult to make the most of what the programme had to offer.**

Almost all participating organisations found the pace of delivery activity fast, and some found it 'overwhelming'. A few project team members spoke of conducting lab 'activity' out of working hours to ensure they could also sustain day-to-day responsibilities, with some having to de-prioritise other, similarly important work.

Reflections from the co-designers felt that the design lab's ambition to support internal capacity building and also deliver a meaningful project output was incongruent with low digital maturity or capacity available within the organisations.

*"This forced us to look at something we needed to look at for a long time. But we had a hairy time at the end. For example, any actual work outside of the project I had to end up doing in the evening, so the pacing issue becomes relevant because it's not sustainable for as long as the programme runs for."*

*IDL cohort member*

Despite having a clear project brief with associated activities, infrastructure organisations are still coming to terms with the realities of 'what it takes' to support and deliver on organisational change.

For example, much of the cohort are now grappling with delivering on an implementation plan that will require sustained resource, likely additional testing, and further iterations before reaching a 'steady state' where the output from the design lab is fully embedded into the organisation.

Delivering on these implementation plans are likely to be more challenging for those organisations with low internal digital confidence, who would have benefitted from ongoing, sustained support.
To support sustained progress, these learnings suggest that a clearer objective for the design lab

would help steer the right combination and duration of support, with staggered starts, ends, and flexible budgets to help see the work 'through' at a pace and level more commensurate with the internal needs of each infrastructure organisation.

*"Higher digital or data maturity might have meant they were more absorbent or responsive to us throwing lots of things at them in a short period, but they were coming in at low maturity."*

*IDL delivery partner*

# Challenges embedding organisational change

**Considering the pace of programme delivery, many individuals struggled to share what they were learning or across the organisation to support wider adoption and embedded ways of working.**

**Challenges in promoting lab opportunities internally:** whilst the training provided and resources shared during the programme was open to the whole organisation, it was usually only accessed and valued by the project teams. The design lab was predicated on individuals participating having the agency and social capital within the organisations to share and promote training opportunities more widely across the their organisation, which wasn't always the case. Many cohort members discussed how they either a) didn't feel fully comfortable to invite others to their trainings

without knowing who would be well placed within the organisation to receive it or b) didn't see much take up, indicating low levels of engagement from members of the organisation who hadn't been involved in other lab activity. It also reflected once again, the capacity and prioritisation challenges infrastructure organisations face when looking to support capacity building.

"**The people who've engaged do seem to have grown somewhat, learned new things, and been introduced to new tools. How much the needle has moved is debatable, but they do seem to have picked things up individually which you hope would seep back into the organisation. So it feels like a movement in the right direction, but there is no silver bullet.**"

*IDL delivery partner*

**Onus on participants to amplify learnings from the design lab:** Outcomes reached through the design lab have largely been limited to the individuals or teams working within the design lab. This would reflect a challenge providing support to a small number of individuals when trying to enact wider organisational change. The current model of support puts the onus of individuals to 'champion' wider engagement with potential resources, tools, ways of working, and mindset shifts.

There were examples of this happening, often where design lab participants transferred their new knowledge and skills to another internal project or initiative they were working on. However, only two cohort members had the cross-functional oversight that could enable more structural, organisational initiatives that would indicate sustained change.

"I sometimes struggle to get colleagues on board. But the kind of conversations triggered in the peer learning session were useful, I just wish more colleagues could participate in the programme. You kind of need everyone in an organisation to buy into this change work and get to grips with it. My colleagues are all busy and for such a small team, it might be unreasonable to expect the whole team to be involved in the training or programme delivery. A lot of these issues point back to capacity challenges. Personally I like change management and developing longer-term projects, but I think the weakness in this model of delivery is you are dependent on the individual you are working with and their relationships in the wider team."

*IDL cohort member*

# Adapting in response to emerging challenges

**The benefit of ongoing reflection throughout the design lab was capturing some of the challenges that both cohort members and delivery partners were sharing with us in real-time, supporting a pivot of the way we convened support half way through programme delivery.**

**After surfacing feedback on the co-designer model as first designed, the design lab pivoted this aspect of the programme between January-May 2022. The model ended up moving to one co-designer, who acted more as a 'link' worker to available support within the IDL. Projects were then delivered by sourcing experts for smaller, more discrete, and intensive 'sprint' based projects, and maintained access to mentoring support from the co-designer. The benefits of which were the following:**

**01 More targeted resource to free up capacity:** Co-designers held a more strategic and empowered role to bring in expertise and adapt support as and when required. This created additional resource within the IDL, and ensured that not all cohort members had to be involved on all sprints, freeing up some internal project resource.

**02 Space to leverage cohort expertise:** The change enabled delivery partners to deliver alternative forms of support. For example, responding to cohort need, Collaborative Future were able to provide peer learning sessions focused on organisational change. SIDE Labs were able to bring in alternative members from their team to deliver discrete tasks that didn't require a mentoring relationship.

**03 Reduced convening onus on co-designer:** By working through mini-projects, co-designers were no longer responsible for identifying how to 'link up' support across the programme. With a greater understanding of cohort need, Shift were able to convene the resourcing of each sprint, and also took on the role of organising and promoting the trainings directly to organisations themselves. Whilst this reflected only a subtle change in support for participants, most delivery partners suggested this enabled them to have more impact in providing appropriate support.

*"I'm glad those changes were made because I just think it better reflected the realities of how the core partners wanted to work and made sure expertise was better linked up to need across the lab."*

*IDL delivery partner*

# Barriers remaining moving forward

**The challenges surfaced throughout the programme are indicative of wider barriers infrastructure organisations face when trying to support longer-term transformational change. Many of these barriers are likely to remain now that the programme has ended to differing degrees for each cohort organisation.**

**1. Finding long-term resource for 'core' work.** Capacity constraints and competing (everyday) priorities pose a risks for each project and wider change initiatives to be sustained in the long run. Whilst it's promising that many of the individuals in the design lab have committed additional resource to support project 'wrap up', it's less clear to what extent organisations are able to resource (and budget) additional capacity to lead and facilitate ongoing internal change initiatives. As staff shortages and recruitment challenges continue to impact the sector, it's likely that any 'non essential' projects or tasks will continue to come second order to ongoing service delivery.

**2. Sustained funding.** During the final feedback session with the cohort, the most common 'shared need' moving forward was continued funding to help build on what had been developed within the design lab. Organisations reflected on how uncommon it was to support core development funding, yet additional funding was needed to support continued development, access to expertise would be useful. As a result, a small minority of the cohort have had to access their reserves to support future development, where as others fear progress will be paused until further funding is raised. This would reinforce the need for regular, unrestricted (and ideally designated) funding to support sustained investment in 'change' based initiatives and organisational capacity building.

*"We've primed interest and got the research we need, but we don't have the funding to move onto the next step. It's easy for funders to start the ball rolling, but it needs to be followed up on and it's the biggest challenge for us now is translating that into action. I think it's about having the project well defined, but our goal is bigger than this programme alone. If you broke it down to milestones at each year, and have check-in with funders to move forward and have some assurance that you aren't operating in a vacuum, that there is sustained commitment from a funder to see this through. At the moment I'm not aware of what will follow on from this which does cause problems."*

*IDL cohort member*

**3. Access to expertise.** Moving forward, there are continued risks that infrastructure organisations are unable to identify appropriate resource with the relevant expertise to sustain change. Some organisations discussed uncertainty in running or managing design processes, with concerns that they may not have the internal skills to complete project-specific tasks.

"This isn't our job, it feels like we pretend to be a designer for 6 months. We are doing it, but it's not our job and you don't have the knowledge or headspace, so we do 30 mins of design lab, and then we have to do our jobs, so i don't really know how we will do it going forward."

*IDL cohort member*

**4. Self-limiting organisational cultures.** A few delivery providers felt that existing organisational cultures within some of the infrastructure organisations maintained quite 'traditional' mindsets, with high levels of resistance towards organisational change. At least two of the cohort organisations felt that they needed to address changes in roles, responsibilities, and siloed structures in order for this type of work to take hold longer term. Whilst surfacing and defining 'organisational culture' is notoriously difficult, feedback across the IDL would suggest that openness to change and adopting new ways of working at senior levels must be part of the process to support continuous improvement and change efforts.

"I maybe wouldn't have recommended them to to go on this programme because there are some fundamental issues there on the board and team dynamics. But I think it's hard to pick that up in the application stage, it's only when you spend time, and see the interactions when working together and that's when it becomes pretty evident."

*IDL delivery partner*

"It's very hard to change cultures within organisations, but sometimes you need that change in order to change service delivery. The opportunity for programmes like this is to bring some fresh air into organisations, but there has got to be some way of bringing in senior management as well."

*IDL cohort member*
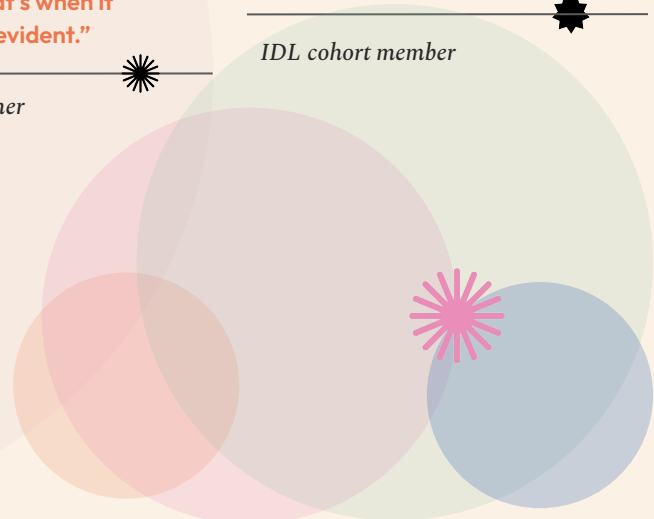
# 08

# Recommendations for future support

This section provides a brief evaluation of our support model, alongside recommendations for future support. Our recommendations are based on the premise of TNLCF or other core funders supporting a similar 'design lab' programme in the future. These recommendations draw on feedback from delivery partners, Shift's reflections from providing a convening role, and the outcomes delivered throughout the design lab for our cohort of infrastructure organisations.

# Evaluating our design lab hypothesis

**The following shares a summary of where our programme hypothesis was supported and/ or challenged throughout the programme, setting the foundation for our recommendations.**

**Selecting an appropriate programme model.** The programme support model had to pivot at the beginning of the programme towards more bespoke, tailored support. This was largely a result of the 'cohort' having disparate needs, skill sets, and digital maturity. Moving forward, any design lab should have a clear objective, budget and delivery flexibility to meet emerging support needs, and 'cohort' or group based support provided only when there is a clear, shared use case for each participating organisation (e.g. similar challenge, focus etc.)

**Project delivery within programme support.** Working on a live project that is supported at senior levels provides impactful learning opportunities for those involved in delivering the project (increased understanding, new skills, utilisation of tools etc.). The model worked best when project teams worked in a regular cadence, on discrete 'sprint' based projects to ensure sustained momentum and relevant expertise on each task. However, there are challenges to scaling learning without senior buy-in, openness to change and organisational structures that are able to share and embed continuous learning. This would suggest tailoring the pace of the programme or segmenting organisations into programmes based on their current stage of digital maturity.

**Foundational training to build shared capacity.** Training was valued for providing relevant practical case studies and opportunities to test different techniques/ ways of thinking in shared spaces. However, many cohort members would have benefited from foundational training before participating on a live project, to build increased confidence in design and research methodologies, project management, and leading change. This could then be complemented with more bespoke, tailored training throughout the IDL based on specific needs. Our support model was more effective when each component of support was relevant and tailored to a 'live task' participants were working on within their project.

This would suggest further iterations of the model should better 'link up' and package training, 'practice', and wider coaching/ mentoring support that can address participant preferences and 'just in time' needs.

**Flexibility in co-design approach.** Building trusted relationships with a small number of co-designers created space for critical inquiry and reflection within each 'project team'. However, any future support model should ensure that this relational approach can still flex accordingly to maximise support capabilities, efficiency and preferred delivery styles.
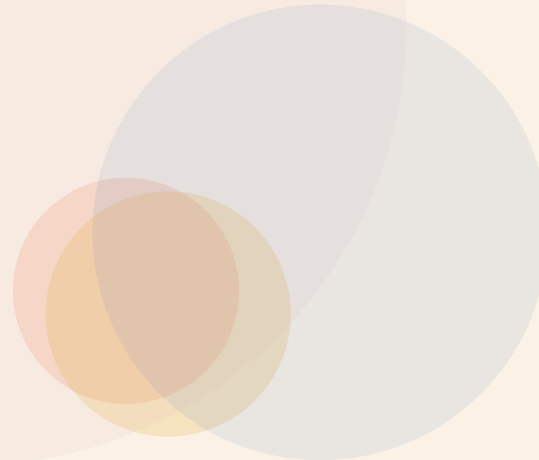
# IDL programme recommendations

**The following shares a summary of where our programme hypothesis was supported and/ or challenged throughout the programme, setting the foundation for our recommendations.**

**01 Continue funding infrastructure to support change.** Largely reliant on unpredictable revenue/ programme grant funding, we recommend continued allocation of core funding to infrastructure bodies, particularly those with still largely nascent trading incomes. We also recommend working closely with these organisations to understand their funding needs, ensuring appropriate funding to support internal resourcing (including digital and project management resource), funding for external support, and the start up funding required to invest in start up costs for future technology (or at least a long enough trial/ implementation period).

**02 Define clear, shared and achievable programme outcomes**. Whilst supporting 'renewal' and 'relevance' for infrastructure is a valid ambition, it speaks to a multi-year change process for some of the infrastructure organisations that participated in the design lab. Many organisations are still working to develop their strategic role in their sector, or need support developing appropriate organisational structures, cultures, governance mechanisms, and ways of working before considering what products, services, and internal operations would support them to become 'fit for the future'. In the future, TNLCF should work

alongside each infrastructure organisations to identify appropriate and realistic outcomes for participating in a funded support programme based on their current stage of development, enabling greater transparency and alignment across the IDL. The learning also suggests further work upfront to build consensus on the process and value of a co-design/ development process and what role each actor will be playing (including TNLCF). This may help overcome some of the uncertainties experienced at the beginning of the design lab.

**03 Include a scoping phase before delivery.** In order to better match up participating organisations with the right combination of delivery support, we suggest supporting a scoping phase before programme delivery. This scoping phase would help surface needs, and ensure that infrastructure organisations are put onto a relevant programme of support based on their stage of digital maturity, or shared need. We would then recommend the team who helps scope support needs, helps facilitate the matchmaking process between participants and delivery providers. We also suggest this scoping team helps organisations to effectively resource and prioritise the programme internally before any programme delivery begins.

**04 Ensure strong rationale for a cohort.** Whether based on place, organisational type, or development stage, in the future it would benefit the overall effectiveness and efficiency of the IDL by having a cohort with similar underlying characteristics that can help build the use case for working more closely with each other and engaging in one-to-many support. We found that organisations engagement with peer/shared learning was highest when they'd had similar experiences or could relate to similar organisational barriers.

**05 Develop an Iterative funding & delivery model.** As a convening partner, Shift often had to balance managing a fixed budget determined at the beginning of the programme with emerging needs surfacing from infrastructure organisations. In the future, we suggest the scoping and/ or convening partner works closely with TNLCF after the scoping phase to determine a more appropriate indicative budget based on each organisation's goals and costed proposals from selected delivery partners. We also suggest TNLCF works closely alongside any convening partner to ensure ongoing contingency is in place to fund additional support on a case by case basis.

# Drafting an iterated programme model

**Based on the recommendations shared with TNLCF, we've provided a brief overview of a revised programme of support based on learnings from the infrastructure design lab**

**Two different programme goals:**

**01 Finding focus.** For organisations who would like support to define/ re-define their strategic role as an infrastructure organisation in order to ensure that their approach, priorities, and internal and focus are fit for future. The programme would focus on organisations surfacing insights around their external landscape to identify an appropriate role(s), ensure they understand their relationship with and the diverse needs of their member base, and ensure future activity does not duplicate wider sector efforts, maximising resource to supporting highest impact activity.

**Clear selection criteria:** Criteria for this programme would focus on organisations having senior buy-in to support the 'need for change', with an openness to receiving feedback, exploring alternative ways of working and delivering service provision. Most importantly, organisations would need to ensure they have capacity across the organisation to surface, interrogate, and then make informed decisions on how they can focus their efforts for future delivery.

**02 Testing solutions.** For organisations who have clear scope of what role is needed, this programme of support would focus on testing a range of different solutions that would help infrastructure organisations to identify and test a range of solutions (e.g. new/ refreshed product or service design, internal technology implementation etc.) to support them in delivering on their strategic focus.

**Clear selection criteria:** Criteria for this programme would would focus on organisations having open feedback loops with their members, a clear understanding of user needs within their landscape, organisational capacity to embed solutions, and clear strong alignment between governance and delivery teams.

**Scoping phase:** After cohort selection, each programme would go through a scoping phase (clearly outlined when participating organisations apply for funding) that helps to clarify and prioritise support needs. This process would factor in scope of projects (across different teams within the organisation), ideal timings for programme start to factor in internal capacity challenges, internal expertise, resourcing and recruitment needs, as well as assessing levels of organisational/ digital maturity.

**Programme design:** Future programme design should identify the right combination of foundational training and bespoke support (e.g. direct support, coaching, mentoring etc.), alongside relevant moments for shared learning/ reflection within

within the cohort (assuming they're at similar stages in the design process).

**Matching and commissioning:** Once a model and scope is in place, delivery partners would then be matched based on relevant skill set and capacity to support organisations in reaching this goal. If time, feedback suggests giving participating organisations more agency on who they'll be working with and learn more about how support will be delivered to reduce any uncertainty/ clarify any remaining assumptions regarding support.

**Team set up:** Within any project supporting change, we suggest there is a clear distinction between who will be managing the project (to ensure progress, budget management), who will sponsor the

project at a senior level, alongside any external 'delivery' expertise and/or coaching & mentoring support depending on what is required to support change. Team's will likely need time to ensure that they are adequately set up and resourced before programme kick off.

**Delivery cycles:** For each programme, we would then suggest running, short targeted cycles of delivery support, creating space for foundational training upfront, ongoing capacity building and testing, and moments of shared reflection to surface barriers, adapt and tweak support to ensure programme goals are met.

# 09
# Appendix:
# cohort case studies

This section shares case studies outlining each of the organisation's journey through the infrastructure design lab.

# Action with Communities in Rural England

**ACRE are an infrastructure body that heads up the ACRE network, a collection of 38 local charitable organisations, working in concert to support rural community projects across England. ACRE provide representation for the network at a national policy level, raising an awareness of the issues that impact on rural communities. ACRE also support networking between members to share learning and also manage larger programmes of work on the network's behalf.**

**Motivation to join the IDL:**
- Previous engagement work identified an opportunity for ACRE to help develop the virtual village halls service requiring external funding and expertise.

**Lab aims:**
- To explore new digital solutions for the ACRE village halls service
- To support network learning around digital engagement applications and tools

**Key outputs:**
- A Steering committee workshop and member survey to identify key pinch points across the village halls service

- A new report identifying potential digital opportunities and solutions for the ACRE village halls service

- A series of workshops with network on digital engagement applications and tools focused on network wide shared learning and capacity building

**Key achievements/milestones:**
- Increased knowledge of member needs
- Better understanding internally of organisational culture

**Key lab learnings:**
- The time it takes to build out digital transformation
- Focus on culture just as important as potential solutions

**Aims for the future:**
- Develop business case for village halls service and align with research findings
- Support greater engagement across network with digital

**Continued barriers or support needed:**
- Would like follow on funding to help test and implement selected village halls service

# ACRE

*Cohort's experience*

**Scoping**

*Found early stages slow due to previous engagement work already conducted*

*Scoping helped refine network support activity*

**Project delivery**

*Often had to balance other organisational priorities as just one person leading the projects within ACRE - could be challenging at times to make space*

**Co-designers**

**Wider lab support**

*Particularly valued coaching / mentorship support on peer learning model*

*Found relationships and flexibility essential to support provided*

*Training felt introductory for current stage, have experience with Catalyst training previously - some duplication*

*Enjoyed the peer learning support sessions provided by Collaborative future*

# Glasgow Council for the Voluntary Sector

**GCVS is a city-based infrastructure organisation, supporting the development of the third sector in Glasgow. GCVS helps Glasgow's third sector to build capacity, providing support and services that help third sector organisations better meet the needs of the local community. Services range from HR, fundraising, and governance support, through to helping build third sector networks and partnerships, and working to develop new innovative initiatives to support sector improvement.**

**Motivation to join the IDL:**
- Looking for digital expertise on specific initiatives prioritised post pandemic and funding to help manage the project

**Lab aims:**
- To redesign the Glasgow helps service
- Use design led, research based practices to build org capacity

**Key outputs:**
- An outline of key software options available that could suit the new membership website platform
- A Glasgow helps prototype with insights from user testing to inform future design
- A full design brief and criteria for development agency selection and engagement

**Key achievements/milestones:**
- Have an understanding of sector wide usage/ need of directories
- Selected a digital agency to move forward with

**Key lab learnings:**
- How digital tools can be leveraged across the organisation
- The time it can take to develop a new product using a design approach

**Aims for the future:**
- Identify other areas in the organisation where the process could be useful
- Develop the product for full scale launch

**Continued barriers or support needed:**
- Funding need to support development of the product
- Need to build a team around sustaining the product in the future

# GCVS

*Cohort's experience*

**Scoping**

*Evident early to focus on Glasgow Helps already conducted*

*Scoping helped refine network support activity*

**Project delivery**

*One member leading the project - had some challenges in getting recruitment participants during user testing. New to 'design process' and style of leading projects using Miro and other digital tools*

**Co-designers**

*Valued 'critical friend' approach*

*Felt co-design spaces were flexible and supportive to help make decisions*

**Wider lab support**

*Training was good, but didn't feel as relevant to project aims*

*Found the simple, practical tools introduced in trainings most effective*

# National Federation of Young Farmers' Clubs

**NFYFC are one of the largest rural youth organisations in the UK dedicated to young people who have a love for agriculture and rural life.Led by young people, for young people, Young Farmers' Clubs provide their 19,000 members aged 10 to 28 support to develop their skills, engage in local communities and build their social networks via events and community.**

**Motivation to join the IDL:**
- Wanted to 'digitise'. Looking to move admin, platforms and processes online for efficiency and to better reflect their young farmer audience

**Lab aims:**
- To re-design the website to become more user friendly
- Turn the website into an interactive platform for membership and event planning

**Key outputs:**
- An outline of key software options available that could suit the new membership website platform

- A detailed wireframe of the website design and associated brief for development

- A job description detailing a new digital officer to support future membership development

**Key achievements/milestones:**
- Developers now in process of developing the new platform
- Most resources and content in process of being developed

**Key lab learnings:**
- Need for an internal project manager or even someone seconded to help manage the project
- Would have preferred a 'consultancy arrangement'

**Aims for the future:**
- Test phase 1 with new website and content uploaded (by Sept '22)

**Continued barriers or support needed:**
- Building engagement across county federations to buy into digital process
- Lack of resource and time to focus on digital projects internally

# NFYFC

*Cohort's experience*
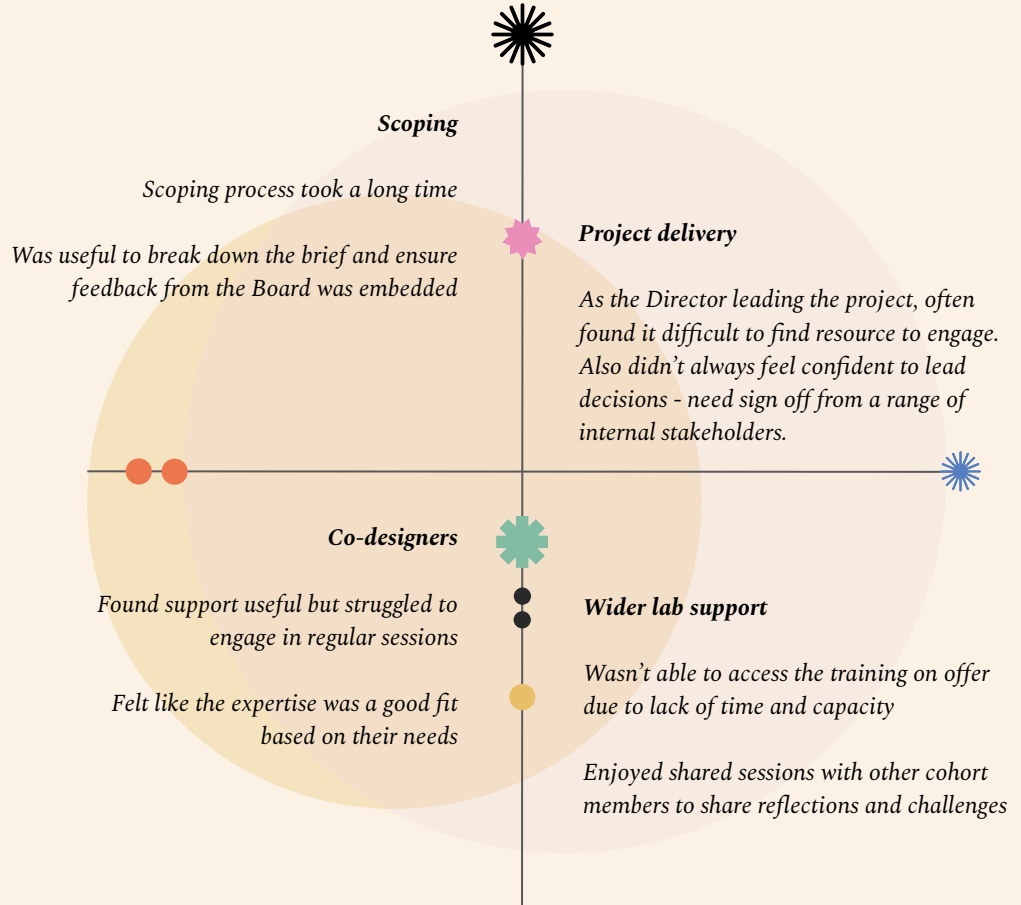
**Scoping**

*Scoping process took a long time*

*Was useful to break down the brief and ensure feedback from the Board was embedded*

**Project delivery**

*As the Director leading the project, often found it difficult to find resource to engage. Also didn't always feel confident to lead decisions - need sign off from a range of internal stakeholders.*

**Co-designers**

*Found support useful but struggled to engage in regular sessions*

*Felt like the expertise was a good fit based on their needs*

**Wider lab support**

*Wasn't able to access the training on offer due to lack of time and capacity*

*Enjoyed shared sessions with other cohort members to share reflections and challenges*

# Voluntary Organisations' Network North East

**Vonne are the regional infrastructure network for voluntary organisations in the North East, covering Northumberland, Tyne and Wear, County Durham and Tees Valley. Vonne have a range of different focuses for the sector; sharing knowledge and intelligence; profile raising and building a collective voice, brokering engagement and partnerships, and supporting the sector to be effective and enterprising.**

**Motivation to join the IDL:**
- Wanted to explore how they could better utilise their internal data and information to improve the member experience across their services

**Lab aims:**
- To develop a data strategy
- Support a data segmentation and analysis of members
- Refine approach to data collection

**Key outputs:**
- A new approach to managing and collecting data to support member improvement
- A new CRM support provider to help them build knowledge of Civi to maximise its use in collecting data
- A new team that has been resourced to support data collection and the improvement of member services moving forward

**Key achievements/milestones:**
- Developers now in process of developing the new platform
- Most resources and content in process of being developed

**Key lab learnings:**
- Felt that a foundational programme would help manage uncertainty of process
- The capacity constraints it put on the team at times – would have liked some space to take breaks

**Aims for the future:**
- Working to now tailor user journey's and automate new processes
- Embed new team to deliver on plans moving forward

**Continued barriers or support needed:**
- Continue to develop the right expertise in and out of the team to support work moving forward

# VONNE

*Cohort's experience*

**Scoping**

*Scoping process was useful to engage the board*

*Would have benefitted from a menu of support to learn about what else was on offer*

**Project delivery**

*Had to balance project delivery with a range of other communications and data tasks. Small delay when changing database support provider.*

**Co-designers**

*Strong fit with co-designers and valued 'safety' of support*

*Delays in linking up new support in the new year - felt they could have made progress earlier*

**Wider lab support**

*Found the support useful - but the timing of support wasn't always relevant to stage of project*

# Carmarthenshire Association Voluntary Services

**CAVS are an independent charitable organisation acting as the umbrella body body for the third sector in Carmarthenshire., providing information guidance and support to organisations and community groups enabling them to become sustainable and effective.**

**Motivation to join the IDL:**
- Wanted to develop new ways of working digitally since the pandemic. Looking to increase membership and increase existing engagement with CAVS members

**Lab aims:**
- To develop a new membership process with the aim to increase membership.

**Key outputs:**
- A newly revised proposition for their members which outlines the main free benefits of CAVS support

- A working prototype of the new membership process online

- An implementation plan that supports guidance for implemented a new automated process to validate membership

**Key achievements/milestones:**
- Feel that they've got clarity on what membership offer should look like moving forward

**Key lab learnings:**
- The importance of hearing from members when developing new initiatives
- Investing in time to reflect and discuss as a team before focus on delivery
- Bringing in external expertise to support different perspectives

**Aims for the future:**
- Embedding the new membership process into existing CAVS website
- Updating the internal processes to automate and digitise the experience

**Continued barriers or support needed:**
- Concerns they may fall back to 'business as usual' **with** continued support
- Challenges prioritising 'core' initiatives with existing capacity challenges across the team

# CAVS

*Cohort's experience*

**Scoping**

*Often found it challenging to prioritise one thing for the IDL*

*Moved priorities from organisational development to focusing on the membership*

**Project delivery**

*Delivery held by Comms officer and a range of other team members - often difficult to break down tasks and deliver a 'design project' when not considered to be their day job*

**Co-designers**

*Enjoyed targeted meetings on an ongoing basis to keep on track*

*Liked the fact that co-designers worked with them on specific tasks - shared responsibility*

**Wider lab support**

*Found the training useful - but some concepts repetitive at times*

*Difficult to know how to share learnings from the training with the wider team*

# The No Accommodation Network

NACCOM is a national network of over 140 frontline organisations and charities across the UK, working together to end destitution amongst people seeking asylum, refugees and other migrants who aren't able to access to public funds because of their immigration status. They support the network through a range of campaigning work, shared resources and learning, as well as tailored support across the network, including specific advisory support and case work.

**Motivation to join the IDL:**
- Wanted to think about the best ways to use their internal resources to both build out their network whilst maintaining tailored, relational support

**Lab aims:**
- To develop a better understanding of their members needs across the network to support prioritisation for services moving forward

**Key outputs:**
- Developed a new detailed research plan to support learning of their members through a range of qualitative research methods

- Conducted member interviews and a wider member survey

- Have translated insights from the analysis into opportunity areas to develop moving forward

**Key achievements/milestones:**
- Having some specific feedback and identified improvement areas directly from members

**Key lab learnings:**
- It can take a long time to conduct research - new tools really effective to support analysis and decision-making
- Relationship allowed for strong engagement with members during research process

**Aims for the future:**
- Developing an implementation plan for communicating with members
- Piloting a community network on Slack
- Further engagement with stakeholders internally to support future prioritisation
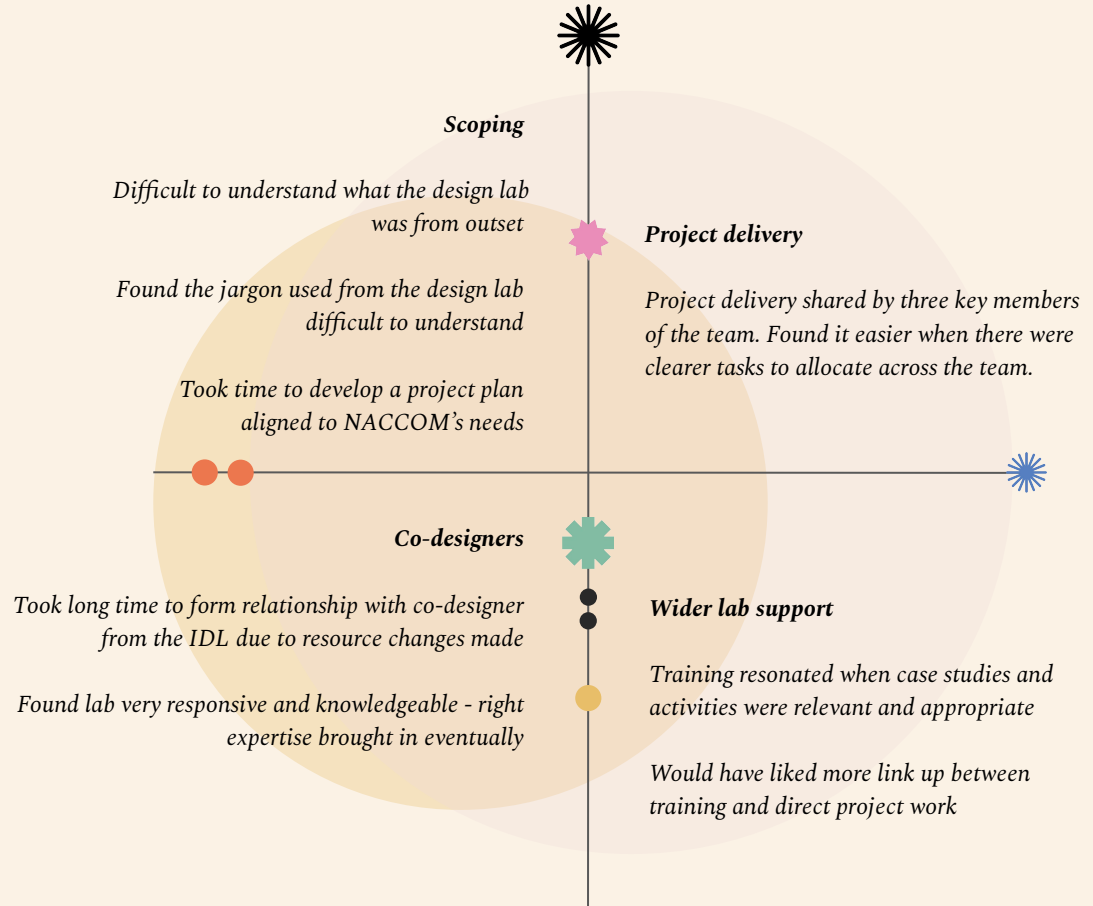
**Continued barriers or support needed:**
- Having the right expertise to support future research
- Having time and capacity to embed new initiatives

# NACCOM

*Cohort's experience*

**Scoping**

*Difficult to understand what the design lab was from outset*

*Found the jargon used from the design lab difficult to understand*

*Took time to develop a project plan aligned to NACCOM's needs*

**Project delivery**

*Project delivery shared by three key members of the team. Found it easier when there were clearer tasks to allocate across the team.*

**Co-designers**

*Took long time to form relationship with co-designer from the IDL due to resource changes made*

*Found lab very responsive and knowledgeable - right expertise brought in eventually*

**Wider lab support**

*Training resonated when case studies and activities were relevant and appropriate*

*Would have liked more link up between training and direct project work*

# Community Transport Association

**The Community Transport Association (CTA) is a national charity that represents and supports providers of community transport: thousands of local charities and community groups across the UK that all provide transport services that fulfil a social purpose and community benefit.**

**Motivation to join the IDL:**
- CTA wanted to find ways to better share the impact of the Community transport network to support future funding and programme initiatives.

**Lab aims:**
- To select a new CRM system that is fit for purpose for CTA's needs moving forward, particularly for ongoing data collection

**Key outputs:**
- Mapped out existing processes and systems to understand limitations and criteria for a new CRM system

- Worked through a process from four different CRM systems to identify a platform fit for purpose

- Have developed an implementation plan to embed new CRM into the team

**Key achievements/milestones:**
- Have a new database in place
- Have new tools to support GDPR and data compliance

**Key lab learnings:**
- Importance of sticking with the process even when it's challenging
- Utilising resources externally
- Ensuring wider team are involved in decision-making during the process

**Aims for the future:**
- Implement the new CRM system selected
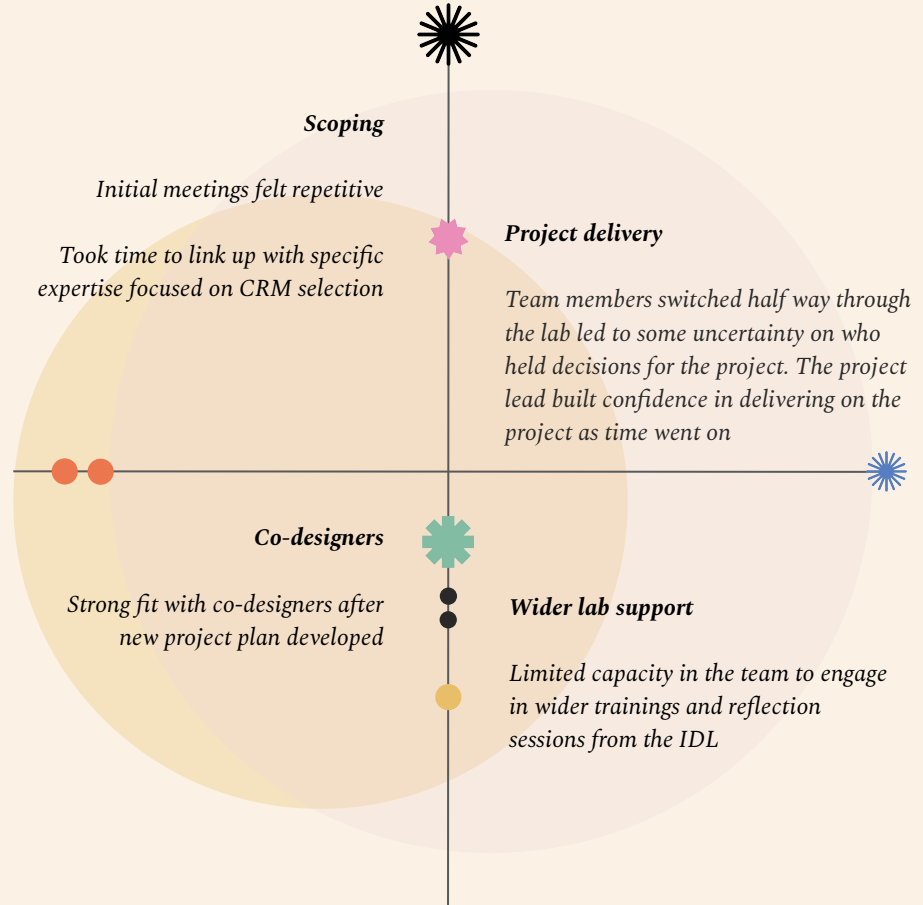- Embed new data collection approaches across the team
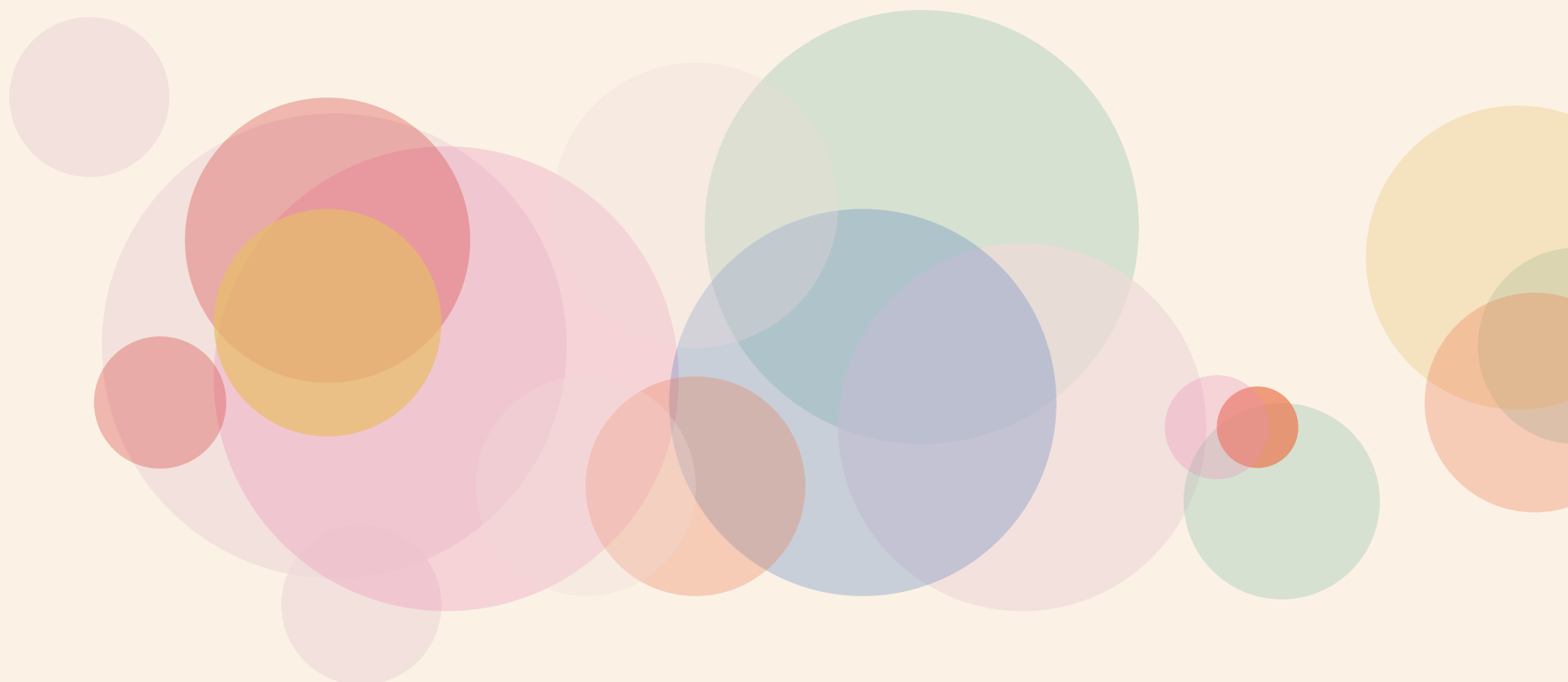
**Continued barriers or support needed:**
- Ensuring continued resource maintained on the CRM implementation

# CTA

*Cohort's experience*

**Scoping**

*Initial meetings felt repetitive*

*Took time to link up with specific expertise focused on CRM selection*

**Project delivery**

*Team members switched half way through the lab led to some uncertainty on who held decisions for the project. The project lead built confidence in delivering on the project as time went on*

**Co-designers**

*Strong fit with co-designers after new project plan developed*

**Wider lab support**

*Limited capacity in the team to engage in wider trainings and reflection sessions from the IDL*