Creating a Learning Culture – learning from Ageing Better

Introduction

Ageing Better is a test and learn programme. It is collecting information and insights from across 14 partnerships to identify learning that will be useful for other programmes and organisations delivering activities aimed at reducing social isolation in people aged 50+.

This toolkit provides information on how you can create a learning culture in your organisation and tips and ideas from Ageing Better about how to do this. Ageing Better set out to be a Test and Learn programme - capturing not just what worked but also learning from what didn't. It aimed to create an environment where good projects that hadn't worked and good projects that did were unpicked to understand how and why.

The toolkit is divided into four sections:

- Planning
- Roles and responsibilities
- Tools and techniques
- Practical challenges

In each section we share our learning from Ageing Better and identify a set of top tips to help you embed a learning culture within your organisation, project or programme.

Planning

Our learning from Ageing Better is that it is important to start with a shared understanding of what the objectives and goals for the learning are. There is also often a need to differentiate between the work which any evaluation will be undertaking and if so, how much of it will include any learning elements.

Ambition for Ageing (Manchester) and Brightlife (Cheshire) developed a close relationship with their evaluation partners, which allowed them to undertake an iterative process of learning as part of the evaluation. Other areas, however, found it helpful to use the two different approaches to collect different data.

We know some of the success from Ageing Better has come from creating both the time and the conditions so that people could adapt their delivery in response to what they were learning. It is important therefore to ensure that review and evaluation is not left until the very end and that there are regular points throughout the programme when review and reflection and any necessary action can take place. This commitment to learning from the start of a programme helps to create an environment and ethos where people feel more comfortable about sharing what has worked and more importantly what hasn't.

In Time to Shine (Leeds) they established both a proactive and reactive approach to learning by developing a set of 21 test and learn questions consisting of things the project wanted to find out as they went through the programme. This "proactive" approach complemented the "reactive" learning gathered when things didn't go to plan and partners needed to change something as a result.

We also heard that areas had learnt that in order to capture anything successfully you need to let go of the desire to capture everything. There is also a need to support partners in separating out the *story* from the *learning* and that people need support and guidance in making that distinction. The chronological description of what happened during the length of a project (the story) is not the same as identifying the key events which led to a change in practice (the learning points). Story and learning are both functions that are useful but often for different purposes and audiences.

It is important to remember that this learning culture takes time to develop. People in organisations may have the experience or expectation that funding will be reduced or removed if they "admit" that their originally planned approach hasn't worked. It may take time for people to open up and be confident enough to share their learning. As a project or programme lead this can be supported or encouraged by leading by example and sharing things that haven't worked as well as key instances of where positive change has happened as a result of people sharing something that hasn't worked.

One area shared the approach they had taken with larger delivery partners who proved to be "risk-averse" in discussing why things hadn't gone to plan. They used a model of asking them to reflect on their learning in terms of how well the intervention models responded to community need (i.e. not necessarily a critical reflection of what they did or didn't do rather a consideration of how well they had met local need).

Meaningful learning also takes time - it takes time to collect information, to reflect on what it means and to then to do something with it. To ensure all stakeholders (including staff, beneficiaries and the senior team as well as members of the wider partnership) are brought in it is beneficial to co-produce the plan with them. In the same way that delivery should reflect and change so too should a project or programme's approach to learning.

The learning plan should be an active and live document that changes in response to feedback from all stakeholders. We found this was particularly valuable towards the end of the Programme when ways of working had been established and a clear set of objectives and goals for disseminating the learning helped to further focus the work. Age Better in Sheffield undertook this process and embedded it into their second round of commissioning. They worked closely with delivery partners to co-produce a learning plan which could then be jointly implemented.

In order for people to commit to learning they need to be convinced and see that it is useful and worthwhile and that things happen as a result of the lessons identified

from it. As well as co-producing plans and strategies, ensure all events and learning products are reviewed. If learning is useful, accessible, practical and worthwhile people are more likely to prioritise, own it and apply it.

Ambition for Ageing (Manchester) found it helpful to focus their learning by scanning local policy priorities for older people. They worked closely as part of the Greater Manchester Combined Authority Ageing Hub enabled them to practically dovetail their interests (inequalities, ageing in place for example) into Ambition for Ageing research and learning plans, so increasing the possibility the learning will influence and change practice and policy.

Top tips

1. Be clear with all stakeholders that time will be created for learning sessions. This will create time for deliverers to reflect and review on their delivery

2. Co-produce a strategy with stakeholders that includes a shared understanding of the objectives and purpose of the learning work

3. Ensure all activity delivered under the learning strand is reviewed to ensure it remains useful and relevant to stakeholders

Roles and responsibilities

Ageing Better has been a large multi-year programme. This has allowed teams and relationships to develop over the duration of the funding. Although most of the Ageing Better areas did not initially have plans for a learning officer role at the start of the funding, by the end most areas had a designated learning lead and/or had separated out this responsibility from any contract management role.

By the latter part of the Programme, most Ageing Better areas had both a local evaluation partner and an internal learning lead. Each area had a different experience of what worked and what didn't but we heard that there was value in having an external partner who was independent of the day to day delivery supporting some aspects of their learning and evaluation at certain stages in their programme's evolution. Connect Hackney ran action learning sets to support their delivery partners and made use of an external facilitator to support this.

We recognise that not all programmes will have the resources as Ageing Better, but we have found it is important to have a designated person and/or role responsible for the driving and collecting of learning within each area.

Our key learning from Ageing Better is that learning should be separated from contract or performance management. Contract management is an enormously important function as it helps hold organisations to account, drive up standards and ensure high quality delivery. But for meaningful test and learn, however, there has to be a safe space where people can openly share what isn't working without any concern of being pulled up for under performance. Although the same person can fulfil the role, they can't do it at the same time. Effective learning requires a safe environment where people feel able to talk freely and this is more challenging if in a contract meeting.

To help with this we found it was useful to include a question at any quarterly review meetings about *"Key learning in the last quarter."* This was because the staff at those meetings could be different from the managers who write the update or contract performance reports and so could provide different insights.

Although we have found through Ageing Better, that most delivery partners value the

opportunity to reflect and where necessary adapt their delivery, we also found that it is also beneficial to have this commitment to learning written into contracts. This ensures stakeholders commit to and take part in learning events and sessions as they have a contractual obligation to do so. It also evidences the commitment on the part of the Programme lead to give time to support effective learning as well as the space to reflect and review operational delivery as a result of it.

We also heard how important it is for a Programme team to "lead by example" in terms of the test and learn approach so that delivery partners are confident that the Programme would support them fully with test and learn and weren't just paying "lipservice" to it.

We found it was valuable to have full and total commitment to the test and learn principle from funders. This is not to say poor performance was not challenged but through Ageing Better, structures were created where there was an opportunity to review and amend delivery as understanding of what did and didn't work developed.

Where several organisations are working together to deliver a programme we found it was worth investing time to help create a team environment or space with partners. We have found delivery partner forums or learning sessions help to foster a sense of organisations working together towards a common goal. Leicester Ageing Together included time for reflection in these meetings to help partners think and reflect about their own delivery.

Top tips

1. Ensure responsibility for collecting learning sits within a clear and designated role whilst ensuring that all parts of the Programme understand their own part in making it happen

2. Separate out conversations and discussions around contract/performance management from conversations and discussions around learning to provide partners with a safe space in which they can share their learning

3. Build in time for all people involved in the project or programme to come together and to create opportunities for team reflection and analysis

Skills and techniques

We have learned through Ageing Better that collecting, collating and disseminating learning is not a skill everyone necessarily has from day one. It is important to provide training to help people to develop their own skills around reflecting and learning.

We also know that people learn in different ways so it is important to have a range of different tools that people can use to interpret and embed the learning. This includes workshops, written materials and podcasts to help collect and share the learning.

It is also helpful to concentrate on sharing learning at key points. For example Time to Shine (Leeds) regularly shared their learning but did so with a particular focus whenever a commissioning round was active e.g. with messages such as "so far, we have learnt that the following approaches work best." Ambition for Ageing (Manchester) are also finding it important to start to talk about and circulate their "key messages" as they enter their final year so that they can further hone and develop them.

Age Friendly Island (Isle of Wight) made use of a learning event to ensure their learning was distributed across the voluntary and public sector stakeholders on the

island. Ageing Better partnerships have developed a large number of learning and insight papers available on their websites.

A further key finding from Ageing Better is the importance of regularly distributing learning insights and products. Collecting information takes time, energy and effort and so it is important that those asked to contribute to the programme or project learning have the opportunity to see what has been produced and what happens to it. This is especially important so that delivery partners become used to hearing about learning and thinking in this way. Bristol Ageing Better for example, created three different mailing lists for communicating their work, one of which was for learning. These mailing lists are held on Mailchimp and they send out e-newsletters using this software.

Time to Shine (Leeds) regularly published learning reports, held workshops etc using the data, stories, quotes and experiences of delivery partners so that partners knew that their contribution was valued, listened to, used and promoted to help others.

Learning products should be produced by a team. This ensures there is critical reflection about the learning products produced and the audience they are reaching. Bristol Ageing Better also found it was valuable to think about the audience for any learning events. They reflected that it was better to bring together a smaller group who were more likely to apply the learning rather than a larger group who were just "a bit interested".

We also heard that the visual look of a learning report can also make a real difference as to whether people want to read it, so taking the time to design it is valuable.

In order to effectively collect and collate effective learning there has to be an infrastructure or mechanism to support its collection. This could be via templates or crib sheets that people use to record some core information but also retain flexibility to allow unexpected outcomes or learning to also be captured. We also found it was important to create opportunities for face to face discussions. This helped people to share information more informally and easily than was the case when always relying on written reports or templates.

We have also been reminded that learning and key insights will likely still be mentioned in situations where you may not be specifically 'looking' for them e.g. when you are walking to the bus stop with a delivery partner and therefore the programme team need to always be approaching situations with a learning lens, even if on the face of it the interaction is not directly related to learning. This could be termed "opportunistic learning".

Bristol Ageing Better hold regular focus groups of people working with specific themes or client groups to gather practical learning and insights. Ambition for Ageing (Manchester) developed an infrastructure within its Programme to support learning collection. This included a standing Research & Learning Meeting bringing together Programme Managers, data analyst and researchers together with Practitioner Networks also sometimes known as Delivery Partner groups. They also produced structured templates for reviews, learning reports and case studies (to dissect known key challenges or changes to delivery models). Whilst such templates were really useful they also made sure that there was a free text section covering *"What happened that was unexpected?"*

Top tips

1. Provide training to delivery staff to help them collect the type of learning that will be useful to you. This includes training on case studies, collecting learning

and undertaking reflection

2. Recognise that people learn in different ways so any approach to learning should combine a range of different tools to collect and then disseminate the learning

3. Make sure enough time is included to allow for the dissemination of learning as well as the collection of it

Practical challenges

At Ageing Better we have been creating a learning culture over a period of six years. We have had the opportunity at all levels of the Programme (including as funders) to reflect and adapt based on the challenges faced. A key challenge has been the desire to have as much information as possible at all stages and we found we had to strike a balance between regular collection of information from delivery staff whilst not overburdening people with requests.

A further challenge seen across a programme of this length has been that of staff turnover. This includes both the learning officers within Ageing Better areas but also within the delivery partners themselves. Keeping the balance between having an understanding of the "history" of the Programme – its "archive" as well as supporting the evolution of the staff team to meet the evolving needs of the Programme has been a challenge.

We also found it challenging to get meaningful learning and analysis rather than output data. This reflected some practical challenges in organisations who had a modest amount of spare capacity to engage in meaningful learning processes or collection. But it also reflected the time it took in some organisations to build the trust that sharing what didn't work was not going to necessarily reflect badly on them. We also found some organisations could be reluctant to share information if they thought it would be used by a competitor when future local tendering processes took place.

Our final challenge is linked to the quantity of data that can be generated. We found without careful planning and organisation it was easy to get overwhelmed by the amount of data that was generated.

It is important to be clear about what information you want to collect, when you want to collect it and how. We found through Ageing Better that delivery was sometimes well underway before it was clear exactly what type of learning would emerge. We found we needed plans to be flexible to accommodate this. On a practical level we also found it was important to have in place a mechanism for cataloguing the information that was generated and this was particularly useful when tools like case studies were used.

Top tips

1. Create regular opportunities for people to share their learning so it does not get lost if particular staff move on

2. Recognise it may take some organisations longer than others to fully adopt the test and learn ethos

3. Have a process in place for cataloguing and organising the learning

Examples of some practical tools used within Ageing Better areas

Induction

Time to Shine (Leeds) held group inductions so that delivery partners could meet each other as well as the programme team which helped to create a feeling of community and shared objectives.

Bringing workers together who do a similar role

Bristol Ageing Better found it useful to bring workers together who do a similar role and ask one or two of them to do an informal presentation to each other each time. The process of creating this presentation was in itself a way to encourage reflection.

The questions covered included:

- What you've done?
- What worked well and why?
- What didn't work well and why?
- Any other learning/advice for the other projects?
- Tools you've used to engage people
- [For community development workers] Do you have any examples of groups that you know of that will be able to continue without your support? (sustainability)
- Allow some time at the end of your session for a Q&A or discussion

Time to Shine (Leeds) also ran action learning sets for delivery partners so that they could meet with and learn from colleagues in other projects across the programme.

Quarterly reports – questions

Many areas asked delivery partners as part their quarterly reports, questions about learning. These questions evolved over time. As colleagues in Bristol Ageing Better commented "asking follow-up questions after reading these reports was often more useful than the written answers themselves". Some of the written questions used across the programme were:

- Please briefly summarise the situation you wish to provide learning about. To get you started, it might help to think about one or more of the following: Something you trialled this quarter, something which happened unexpectedly, something you planned to do but it didn't go ahead, something which has given you a new perspective, trends you are seeing within your project, assumptions you made which turned out to be wrong, something you would do differently next time, advice you would give to other projects, feedback from participants.
- What expectations did you have? What happened in reality? What went well? What did not go so well?
- Why do you think this happened?
- What would you do differently next time?
- Please summarise the key things that you learned from this situation.

- Are there any people / organisations in particular who would benefit from this learning?
- Has this situation brought up any areas for training or support?

Research discussion groups

Bristol Ageing Better set up a research discussion group with delivery partners every 2-3 months. Although the main purpose of this was to make sure their practice was being informed by the latest research, Bristol Ageing Better also found that learning came up informally because it put attendees in a more reflective headspace and they could informally compare experiences and ask each other questions. This is an example of an informal learning environment that a programme or project could create.

Further information

More detail on our wider insights from across the Programme to date together with an overview summary of our learning to date are available at Ageing Better