

The National Lottery Community Fund: Ageing Better

**Roundtable on Test and Learn Approaches
22 September 2021**

Insights Pack

On the day

On 22nd September 2021, we convened a roundtable on Test and Learn approaches. Our objectives for the day were to:

1. To share the **overarching lessons** about the test and learn approaches developed by the Ageing Better programme
2. Reflect on the **pros and cons** of these approaches
3. Reflect on how other funders might **use and apply these insights**, both individually and collectively

Flow of the session

- Welcome and housekeeping
- Opening perspectives: What we have learnt
- Breakout Groups 1: Quickfire - what questions do you have?
- Breakout Groups 2: How to use these insights
- Closing reflections

Ruth Bamford introduction

Ruth Bamford shared an overview of the test and learn approach taken by Ageing Better programme. She said:

Test and learn is a mechanism for building in continuous improvement. It allows reflection and understanding of what partnerships are finding; creates a culture which values sharing what works and what does not; and gives people the confidence and opportunity to change based on data, learning and insight so as to better deliver on the overall outcomes.

Ruth's presentation slides follow (7 slides)



Ruth Bamford

Funding and Relationship
Manager, The National
Lottery Community Fund



Ageing Better: Test and learn



Ageing Better

The National Lottery Community Fund project reducing loneliness and social isolation in people aged over 50.

- 7 years of ‘test and learn’
- We didn’t know what would work
- No “one” Ageing Better model
- 14 local partnerships





Test and learn has come to represent a shorthand or terminology for an agreed way of working to reflect and understand more about what partnerships are finding. And to give people the confidence and opportunity to change based on data, learning and insight so as to better deliver on the overall outcomes. It is a mechanism for building in continuous improvement.



Setting the boundaries & understanding the objectives

- Be clear & honest about the purpose & scope of test & learn
- Where isn't it appropriate
- Goal not necessarily “innovation”
- Funder relationships - requires adaptation
- Development of trust - honest conversations
- Acknowledge the power dynamics



Systems & processes

- Understand the role of performance management in test and learn
- Not a “get out of jail free” card
- Range of tools
 - Quarterly reporting
 - Reactive & proactive
 - Keep it live
- Date is important but keep in perspective
- Trusted relationships
 - “admitting” what hasn’t worked
 - holding each other to account
- Focus on reflection and review



Applying and implementing change

- Develop a culture of reflection
- Formal review points
- Focus on what you want to achieve and why
- Links to coproduction
 - ensures the voices of the people working with are empowered. Deliver with and for them
 - Provides the flexibility to change things when it isn't working
 - Individuals see that things are changing as a result of their input



Common learning

- Test, learn and apply
- Clarity on boundaries
- Impact of targets
- Delivering with and for the people in your community
- Requires time and resource on all sides

Opening perspectives from Ageing Better partnerships

Next, we heard from two Ageing Better partnerships who shared their experiences of being part of a “test and learn” programme.

We asked them to discuss: What was different about being part of a test and learn approach through the Ageing Better programme? What did The National Lottery Community Fund do differently in this programme?



Annabel Collins

Programme Manager, AgeUK
Camden



Chris McClelland

Programme Manager,
Brightlife Cheshire

Annabel Collins - AgeUK Camden



Annabel Collins

Programme Manager,
AgeUK Camden

To view a recording of
Annabel's talk, [please
click here.](#)

In Camden, the Programme budget was used to tender out activities and services for people over 50, so the Programme funded a range of local organisations, chosen through a competitive bidding process. Operational data was collected through the contract monitoring process and through an evaluation partner. This data underpinned the test and learn process. The partnership learned about how to make this work in practice. Key takeaways:

- **Build trust.** If you want an organisation to admit when things aren't going well, you need to take the time to build trust with them. You have to understand what they're doing and why it's not working. You have to be clear from the outset about what's negotiable and what's not. You're asking them to trust you not to misuse your power. This is particularly relevant for minority groups who've faced systemic racism and discrimination and so view you as part of a system which has treated them badly.
- **Fund time.** Remember to always fund the extra time it takes for organisations to engage in collaborative work.
- **Be bold.** If things aren't working make a change, no matter how difficult that might seem. Being open to sharing when you've been wrong is an important way to model the behavior you're looking for. Be open about it with those you fund. Be reflective as a funder, learn from what people are telling you, as well as asking them to learn. Camden ran a number of funding rounds for smaller contracts, providing community activities and they learned as they went about what things worked and what didn't. For example, if there's a question on your form that is always answered badly, change that question. If there's a target which you've set, which doesn't seem to be gathering any meaningful information, get rid of it.

Chris McClelland - Brightlife Cheshire



Chris McClelland

Programme Manager,
Brightlife Cheshire

To view a recording of
Chris' talk, [please click
here.](#)

Chris started off by saying that being involved in a “test and learn” programme has been one of the most rewarding work experiences that he and his team have had, because they’ve had the confidence and opportunity to try things, and to be experimental and innovative. However it wasn't always like that. Over the years the Cheshire partnership worked with the Lottery and with their network to build confidence, trust and a learning ethos to achieve positive outcomes, sustainability and legacy. Key takeaways:

- **Listening and testing.** It was vitally important that a co-production approach ran alongside the test and learn ethos. As part of co-production, you don't assume that you as a commissioner or as a funding organisation, know all the answers. The organisations you work with are there because they have expertise and a reach into the community. Cheshire's approach drew a line from co-production to innovation to testing to success.
- **Reflection and action.** While the programme was formally evaluated at national level most of the important learning came through conversation, reflection, review, and a willingness to change things in time in the moment, rather than waiting to the end to bring things together.
- **Trust and accountability.** The Cheshire partnership had to manifest its relationship of positivity with the Lottery, their providers and their network and social prescribing partners. Having mutual trust is essential - this has changed the way a lot of organisations think and behave by bringing together a test and learn approach with trust..

Breakout - Questions

Breakout 1: Questions

In the first breakout discussion, participants were in groups of 3 and discussed: “**What are the main questions, challenges or gaps you can think of in relation to test and learn approaches?**”

What are the main questions, challenges or gaps you can think of in relation to test and learn approaches?

1. **Tensions.** Boundaries *and* flexibility are needed for this to work properly. How do you manage tensions?
2. **Risk.** How do you set the grant conditions to allow for risk, but not poor performance?
3. **Trustees.** How can we help trustees hold their nerve?
4. **Impact.** How can you balance the need to encourage learning with the need to demonstrate impact
5. **Skills.** What additional skills do you need to implement a test and learn approach?
6. **Triggers.** What are the triggers to go down the performance management route, sound the alarm bells etc?

Responses and solutions

- Partnerships said that sometimes it was helpful to have the additional “layer” of the National Lottery Community Fund, when having difficult conversations with provider - explaining that there was a need for accountability at this level helped smooth difficult conversations and gave partnerships a back stop
- It is important to have really clear targets, but also you need space to recognise when you have chosen the wrong things to measure.
- Partnerships spent time trying to support their contractors in defining realistic targets that they could then be held to account for - organisations are used to doing this to win funding - it can be hard to break these habits
- Test and learn was also new to TNLCF. The relationship w/ Board and trustees is vital. Don't forget the importance of communication, especially in a long-term programme.
- It is important to only collect the data that is actually useful, and that can help you improve
- A key requirement is time and resource to build relationships. Roles shifted during the Ageing Better programme to put more time into learning and reflection and less into traditional programme management. There is a balance to be had between funding for delivery and learning.
- Triggers were if targets were not being met repeatedly without understanding why or where there were no alternative solutions being proposed

Breakout - How to use these insights?

Breakout 2: How to use these insights

In the second breakout discussion, participants were split into 2 groups and discussed two questions: **1. How might you use the insights shared today? Think about how you'd use them a) individually and b) collectively** **2. What questions would you leave us with?**

- **Resources and scale:** Resources were an important consideration. These impacted the depth and scale of relationships that could be built and would have an implication for whether / to what extent others could implement a true test and learn approach.
- Some participants stated that they do not think they have the resources to have a deep relationship and asked: what can we do in a scaled down version?
- **Motivation:** One participant noted that being involved in test and learn programmes was really motivating for staff
- **Funding:** This approach is only viable in a long-term programme - e.g. five-year grants. It also requires flexible funding that can move with the delivery. Trustees will see fewer "quick wins", but longer and deeper relationships and impact over time.
- **Data.** Could we develop a shared narrative on what data should show / can show in a test and learn programme / what to expect? How can we support trustees to understand that data doesn't always need to show bigger / more. Bigger isn't always better. This is "old school" funder thinking.
- **Language.** There can be barriers to engagement with test and learn programmes - with more professional / engaged (but not necessarily better) organisations more able to engage with the language. How can we avoid and move beyond this?

- **Collaboration and knowledge sharing:** Participants expressed a desire to collaborate with others, particularly more experienced and knowledgeable funders. A collaboration gives that space and distance (trustees more comfortable as risk is shared) to overcome barriers to test and learn. Could there be potential to do this in less well-understood areas of ageing - e.g., inequalities an ageing.
- Another key area for collaboration is ensuring that we do not repeat "testing and learning" in areas which have already been explored - we need to share learning. How could funders make it easier to share what's already learned and make it clear where we don't need to test and learn again?
- **Applicability and delivery** It is important to think about where test and learn is the right approach i.e., where do we need this approach because we don't know what works already? In terms of application, what is best practice? Wherever you are the model might need tweaking to the particular circumstances of the programme - there isn't a one size fits all approach.
- **Timing:** A key issue to consider is how long it takes to see results from a test and learn approach - as well as long-term funding there needs to be a long-term approach to understanding impact

Information and resources

About Ageing Better

Ageing Better is a 7-year test and learn programme. We are 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+. To date our partnerships have worked with over 134,000 people. **Ageing Better national learning can be segmented into three clearly defined areas: context, connections and ecosystem. These three interconnected segments build a picture of the macro and micro factors, services and support systems, that help us to better understand loneliness and social isolation in people aged over 50.**

Context: There are a range of risk factors that can occur, often in combination which lead to people finding themselves becoming socially isolated. These include mental health issues, lack of confidence or self-esteem, as well as transition points (e.g. retirement, illness, bereavement) and environmental and physical factors that act as a barrier to someone being able to connect with their community and support systems.

Connections: Understanding someone's unique situation is key to engaging with them as individuals and identifying the barriers they face in making connections. The people who are most socially isolated (where isolation is entrenched and embedded) will need some level of one-to-one support to help address their isolation. This support is person-centred and holistic and involves taking the time to develop a relationship with the individual and at their pace to build trust.

Ecosystem: The Ecosystem is fundamental to addressing social isolation as it is the space where individuals connect with the community. It works preventatively to keep people socially connected and steps in when social isolation occurs. It includes interventions that people 'need' as well as the activities and groups people 'want' to engage with; opportunities and provision for people to set up their own groups and community development, that includes age friendly activity. This Ecosystem will vary from place to place and recognises the importance of people working together as no one organisation can "fix" social isolation and loneliness. It also recognises that as important as specific interventions are, they need to be part of something wider.

Ageing Better National Learning Reports

Programme approach

- [Test and Learn](#) --- [Learning snapshot - key messages](#)
- [Age Friendly](#) --- [Learning snapshot - key messages](#)
- [Creating a learning culture](#)
- [Programme Set Up and Development - Reflections](#)
- [Use of Language](#)

Covid-19 specific

- [Communications work during Covid 19](#)
- [Covid 19 - Learning from Ageing Better](#)
- [Covid 19 - Transition Phase](#)

Further information

More information on the Ageing Better Programme including insights from across the programme are available at [Ageing Better](#).

Ageing Better National Learning Reports

Working with specific groups of people

- [Bereavement --- Learning snapshot - key messages](#)
- [Economy and Personal Resources --- Learning snapshot - key messages](#)
- [Intergenerational Working --- Learning snapshot - key messages](#)
- [Positive Mental Health --- Learning snapshot - key messages](#)
- [Reducing Social Isolation and Loneliness in LGBTQ+ Communities aged over 50 --- Learning snapshot - key messages](#)
- [Working and Engaging with the BAME Community --- Learning snapshot - Key messages](#)
- [Working and Engaging with Carers --- Learning snapshot - key messages](#)
- [Working and Engaging with Older Men --- Learning snapshot - key messages](#)
- [Working and Engaging with Older People living in Sheltered Housing --- Learning snapshot - Key messages](#)

Ageing Better National Learning Reports

Ways of connecting

- [Bridging the Digital Divide](#) --- [Learning snapshot - key messages](#)
- [Groups](#) --- [Learning snapshot – key messages](#)
- [Hybrid models of delivery](#)
- [Learning from Community Connector Projects](#)
- [Learning from Community Connectors - Time Limited Interventions](#) --- [Learning snapshot - key messages](#)
- [Positives of Digital](#) --- [Learning snapshot - key messages](#)
- [Role of Connectors](#) --- [Learning snapshot - key messages](#)
- [Role of Food in Building Connections and Relationships](#) --- [Learning snapshot - key messages](#)
- [Social Prescribing - Health Referrals](#) --- [Learning snapshot - key messages](#)
- [Telephone Befriending](#) --- [Learning snapshot - Key messages](#)
- [Working with Community Assets](#) --- [Learning snapshot - key messages](#)

Thank you

Thank you very much for joining us for the Test and Learn approaches event. We hope it was a relevant and insightful event. If you have any questions or comments, please feel free to contact lydia@kscopehealth.org.uk