



'Knowledge and learning' for social projects aiming to grow or 'scale'

A checklist for social innovators looking to demonstrate their impact, improve their work, and build a learning culture.

January 2018

This checklist was developed based on the experiences of eight promising ageing innovations from the Accelerating Ideas programme, which was supported by Nesta, and the Big Lottery Fund using National Lottery funding. The eight innovations have a focus on building networks, supportive communities and deep levels of connection to help older people to feel healthier and live well (see Box 1). Through the Accelerating Ideas programme, the projects are aiming to increase their reach and impact by scaling their services to many more people across the UK. All of the projects have spent time thinking about knowledge and learning - that is, all the information, and uses of information, which they need to support their development and scaling efforts.

Box 1: The eight innovations participating in the Accelerating Ideas programme

- **British Lung Foundation's** Integrated Breathe Easy peer support programme connects people living with chronic lung conditions with each other and healthcare professionals.
- **British Red Cross'** 'First Call' service supports vulnerable people as they recover from a crisis and helps them remain independent at home for longer.
- **Cares Family** creates community networks of young professionals and older neighbours who hang out and help one another.
- **Carers UK's** national volunteering programme enables people with experience of caring to provide valued support to help others better manage their caring role.
- **GoodGym** is a new way of supporting older people. It's powered by a growing community of runners who work to reduce isolation among older people and bring communities together.
- **GoodSAM** is a collaborative platform, and a community of first responders, that can increase the chances of survival after a cardiac arrest.
- **Stroke Association's** peer support network brings people living with the effects of stroke together, to reduce isolation and promote recovery.
- **Shared Lives Plus** is an innovative form of social care based around sharing home and family life.

This short guide gives other social innovators advice on how a focus on knowledge and learning can support the growth or 'scale' of their work. It accompanies a longer report by NPC, which can be found here www.thinknpc.org/publications/knowledge-and-learning-for-social-organisations-aiming-to-grow-or-scale-up

This guide focuses on three things:

1

What is 'knowledge and learning'?

Knowledge and learning is a broad term, referring to all the information—and uses of information—which a social project may need to support its development.

It encompasses concepts like 'monitoring', 'evaluation', 'impact measurement', 'data collection', 'research', 'evidence' and 'knowledge management'. It concentrates on social impact more than other aspects of scale (e.g. business planning, financial modelling, fundraising or marketing).

The overall aim of knowledge and learning is to maximise the quality, effectiveness and impact of projects. And - where projects have been shown to help or make a positive difference - to provide evidence to support their growth. Good knowledge and learning helps projects to achieve this by giving accurate, timely and useful information to all people who are involved in funding and running a project.

The following checklist suggests what to consider as you think about how knowledge and learning can inform your work:

| What is knowledge and learning? | | ✓ |
|---------------------------------|--|---|
| Knowledge and learning | Are you clear on what knowledge and learning means for your social project? | |
| | Have you engaged with stakeholders (senior managers, managers, frontline staff and volunteers, beneficiaries, etc.) to talk about knowledge and learning, and what it means for them? | |
| Scaling | <p>Do you know what you need to focus on, as you scale? For example, is it:</p> <ul style="list-style-type: none">• Establishing the credibility of the project, so that people see evidence of it 'working' and are willing to invest in or use it?• Learning more about how the project works, to make improvements?• Information about what's happening on the ground, to improve performance?• Learning what parts of the project need to be consistent vs. what can be changed to reflect the local context?• Better understanding cost-effectiveness and economies of scale? | |

2

What questions social projects can address through knowledge and learning, how to ask them and how to prioritise them.

We suggest there are three broad questions that knowledge and learning could cover for social projects that are growing, and we address each of these in turn.

Does it work? Can it make a positive difference to people's lives?

For many scaling projects this is the million-dollar question. They see their projects working with their own eyes, but need better evidence to confirm this and persuade others.

The first thing to do is ensure your project's model is robust, articulated and agreed across the team. To do this we suggest developing a logic model or theory of change.

Projects may also be able to draw on existing data or external research to show that the work is needed, and that ideas are consistent with what is already known about the issue.

Ultimately, you may have to collect some evidence of the project 'working'. This is no easy task, but depending on how your project operates, there may be opportunities for getting data to help answer the question. For example, conducting small-scale research, accessing data from other sources, etc. If not, then projects might have to commission an impact evaluation - for which they will need extra funds and outside expertise. The need for impact evaluation is represented by levels 2 to 4 in Nesta's Standards of Evidence.

| Does it work? Can it make a positive difference to people's lives? | |  |
|--|--|---|
| Are you clear about what the project is and how you think it will work to improve people's lives? | Have you developed a theory of change or logic model? Have you involved a wide range of people in doing this? | |
| What does the existing research tell you about the model you are developing? | Is there data from official or other sources that can tell you about levels of need in your project's target beneficiaries? What do you know about your target beneficiaries? What do they tell you about what they need and what will help? Is there relevant academic insight (e.g. theories, hypotheses, assumptions)? Are there previous evaluations of similar interventions? | |
| Do you need to do an impact evaluation of your project? | Have you determined which elements of your project are already well established by existing research? Could a small-scale quantitative or qualitative research study help indicate that your project is on the right track? Is there data about your beneficiaries available from referral partners or other secondary sources that you could access and use to study outcomes and impact? Do you have any opportunities to create a control group and measure your impact more precisely? Do you have any opportunities/funds to commission a formal impact evaluation? | |

How does it actually work?

The second of our three questions is a continuation of the first, and is about going into more detail, in two ways:

- To get a better understanding of how the project is working and learn how to maximise impact.
- To get a better understanding of whether the project is being effectively implemented.

In other words, the lens shifts from trying to demonstrate that the project 'works' towards improving the work and achieving more impact for people.

To answer these questions, we suggest that projects try to collect data routinely, and in-house rather than outsourcing. Scaling projects will need to use a range of methodologies to collect the following types of data:

- 1. User Data:** The characteristics of the people they are reaching.
- 2. Engagement data:** The extent to which people use the project and how they use it.
- 3. Feedback data:** What people think about the project.
- 4. Outcome data:** The short-term changes or benefits that people gain from the project.

Ideally these data will be entered, analysed and reported in a single data system, and we recommend that all projects consider off-the-shelf systems that they could adapt for this purpose.

| How does it actually work? | | ✓ |
|----------------------------|--|---|
| Data collection | Do you have plans for routine collection of data about users and their engagement with the project? | |
| | How will you collect feedback from service users? Which formal and informal methods will you use? | |
| | Do you know what outcome data you need to collect? Who will you try to collect it from? What methods will you use to collect outcome data? | |
| Data analysis | Are you able to link all your data to explore the relationships between different elements? | |
| Data systems | Have you considered what level of data collection system you need, given the stage of development of your project? | |
| Data use | Do you know how you will use the data you collect to inform your work and make decisions? | |

How can we make it work at scale?

The third question covers the knowledge and learning needs that are specific to a project's scaling plans. This can be seen as a project's 'market research' or 'business research' and can be broken down into demand and supply questions, and questions to ask before and during the scaling process.

| | Before you scale | As you scale |
|---------------|---|---|
| Supply | <p>What capacity and capability do we need to successfully deliver at scale (including staffing, infrastructure and capital)?</p> <p>How much do we expect it to cost? How will we monitor and minimise costs?</p> <p>What level of throughput/turnover do we need to deliver the project effectively, break even, demonstrate good value for money and grow further?</p> | <p>What do we actually deliver at scale? How much?</p> <p>Is it good quality? Does it fit the model?</p> <p>How does quality vary across sites?</p> <p>What level of adaptability is allowed at site level?</p> <p>How much does it cost - overall and unit cost?</p> |
| Demand | <p>What do we know about our market, including people's needs and preferences?</p> <p>What is their willingness to take part?</p> <p>How do we reach and engage them?</p> <p>What else is out there? Who are our competitors?</p> | <p>Who do we reach at different sites? Are they in the target group?</p> <p>Who is coming back? Who is engaging?</p> <p>Are we engaging enough of the right sort of people to deliver the model?</p> |

How to prioritise from all the above

We acknowledge that scaling projects will have to prioritise from what is a wide range of possible questions. We suggest that the best way for them to do this is to consider:

- What - from all the above - do they know already? Or what do they know with enough confidence?
- What are the most important, or most urgent, things they need to know?

The following checklist guides you through what you should consider as you think through what questions you will need to answer and prioritise as a part of your knowledge and learning work:

| How can we make it work at scale and prioritise all your knowledge and learning questions? | | ✓ |
|--|--|---|
| Data collection | Are you clear on where you are on the scaling journey and which questions are most relevant for you to consider? | |
| | Have you checked whether there is any additional research you need to do to support your scaling journey? | |
| Priorities | Have you considered all the questions above and your immediate priorities? Do you know what the four or five things are your project most needs to know? | |

3

Creating a knowledge and learning culture

Knowledge and learning is as much about how projects operate day-to-day as it is about data collection. We refer to this as having a knowledge and learning culture.

What does a knowledge and learning culture look like?

In short, it is about everyone involved in a project working to collect data, thinking about results and trying to continuously improve what they do. Through this culture, we think projects can get better at understanding what is working, adopting best practice, learning from mistakes, and tailoring services, becoming more efficient and celebrating success.

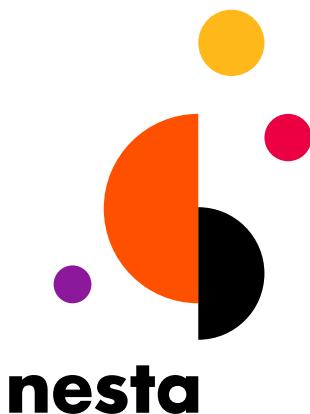
What can projects do to establish a knowledge and learning culture?

We make a series of suggestions for how projects can work towards a knowledge and learning culture, which are summarised in the checklist below:

| What can projects do to establish a knowledge and learning culture? | |  |
|---|---|---|
| Knowledge and learning | Does your organisation and/or team have the 'right' knowledge/attitudes/behaviour about knowledge and learning? Where are the biggest gaps? | |
| | Have you developed a knowledge and learning plan covering priorities, the data that will be collected, and how it will be used? | |
| | Is it written in an accessible language that anyone could understand? Do you have a strategy to keep the plan 'live', and at the front of mind across the organisation and/or team? | |
| | Have you communicated your knowledge and learning ambitions and plan widely? Have you addressed any misapprehensions? | |
| | Have you defined roles and responsibilities to help you achieve your knowledge and learning plans? | |
| | Do you have the capacity to implement your knowledge and learning plan? If not, are more resources available or do you need to have modest plans? | |
| | Do you have leaders and champions who will lead your knowledge and learning work? | |
| | Have you consulted all relevant people about knowledge and learning plans and processes (e.g. volunteers, beneficiaries, staff)? | |
| | Have you considered what incentives might help people in knowledge and learning? | |
| | Have you considered how you will communicate learning as the project develops? | |

We hope these checklists are helpful by highlighting the main things you could think about when you develop your knowledge and learning strategies.

For more information, please refer to our longer report
www.thinknpc.org/publications/knowledge-and-learning-for-social-organisations-aiming-to-grow-or-scale-up



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