Northumbria Research Link

Designing transformation in the voluntary sector

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This paper presents the key findings from a recent Doctoral inquiry into the impact(s) of a Design approach in Voluntary Community Sector (VCS) contexts. Using Action Research and a case study structure, the Design approach was introduced and applied within three VCS organisations in succession. Data on the impact and perceived value of the approach to a range of stakeholders was captured during, immediately after, and in the year following the engagement. An inductive analysis process was then employed to build theory from the collated case study data. The paper briefly describes the design activity in each of three medium-sized VCS organisations before presenting the three key outcomes of the collaborations: more customer-focused services, financial impacts and organisational learning. Significantly, the paper will discuss how in two of the three charities, design resulted in transformational change; fundamentally altering the organisation's culture and vision to the benefit of all stakeholders.

Introduction

In recent years, UK public services have undergone a significant transformation to both reduce public spending and promote user choice (HM Government 2011). This has extended and intensified the purchaser-provider relationship many VCS organisations had with the state, whilst creating a customer-provider relationship between organisations and their beneficiaries (Needham & Carr 2009). The VCS has therefore been facing the challenge of meeting altered expectations of what they offer and how they are funded.

However, the transformation agenda and accompanying volatile fiscal climate has had a considerable impact on VCS organisations' capacity. Although the sector's workforce has now risen beyond the pre-recession levels (Crees, Dobbs, et al. 2016), the sector has seen an even bigger increase in service demand: 70% of charities surveyed experienced an increase in service demand in 2015 and expected this trend to continue in the subsequent 12 months (Oakley Smith et al. 2015). The sector has been trying to meet this rapidly rising demand for better, more personalised services, with no capacity to make the changes required.

Following the result of the EU referendum and the austerity measures predicted to follow (Ricketts 2016), there is increasing imperative for the VCS to not simply cost-cut, but to transform their services and delivery mechanisms, in order to ensure the stability of the sector. As organisational

change models are often unsuitable for use in VCS contexts (Kellock Hay et al. 2001, p.252), a new approach is needed to enable organisations to undergo internal transformation at the same rate and scale as the external change.

Design is a human-centred approach that is adept at addressing 'wicked problems' (Rittel and Webber, 1973; Buchanan, 1992) such as those charities aim to tackle. A design approach involves understanding human needs, values and behaviours, in order to enable stakeholders to see their offer as a part of a holistic journey rather than a "single product". It is a participatory approach that involves end users (including service beneficiaries, staff, managers, funders) in constructing the understanding of the problem and the solution itself (Burns et al., 2006; Blyth and Kimbell, 2011). Designers draw on an arsenal of creative tools and methods that can enable this community to generate new, unconventional ideas (Brown, 2009). Its visual and tangible roots can help to translate ideas into real change through iterative stages that ensure the ideas meet their intended purpose. A Design approach is largely new to the VCS, but has been shown to deliver impacts in both private and public spheres that are desirable to the sector's organisations at present, including: *improved customer experience* (Hollins 1993); *connected, cohesive systems* (Bate & Robert 2007; Mulgan & Albury 2003); *efficiency savings* (Design Commission 2013, p.35; Design Council 2010, p.3); and *new organisational strategies and cultures* (Gloppen 2011; Junginger & Sangiorgi 2009).

To explore the value of a Design approach to the sector, a doctoral inquiry was conducted exploring the value of a Design approach to VCS organisations looking to redesign existing, or develop new, public services (Warwick 2015). Design was used within three VCS organisations, on an issue of their organisational importance to them, for an eight-week period. The outcomes of these interventions were measured before, during and after each collaboration.

This paper will present and discuss the three core outcomes from the use of Design in three organisations: more customer-focused services, financial gains and organisational learning. Although the research also delivered findings about *how* these outcomes were achieved and *why* some organisations experienced different outcomes (one organisation experienced less transformational change than the other two), this paper focuses on the *what,* in order to build understanding of the application and outcomes of Design to an audience largely unfamiliar with the approach. The latter two questions are covered in detail in the doctoral thesis (Warwick 2015).

Methodology

There have been no explorations of the use of Design in a VCS context to date (Warwick 2015, p.13). It was therefore necessary to build knowledge of its potential value to the sector through its application. To generate practicable theory from this application a hybrid research methodology was selected: Action Research (Lewin 1946; McNiff & Whitehead 2011) provided a structure to both act and construct knowledge simultaneously, and an exploratory case study (Yin 2003, p. 45) enabled the translation of 'local theory' (Elden 1983) to a generalizable one.

A Design approach was used in three VCS organisations, which were considered as three cases in a multiple-case case study structure (Yin 2003); Charity A; Charity B; and Charity C. Each VCS organisation chosen as a case had to be a formally constituted VCS organisation with an income from charitable activities between £100,000 and £1 million per year, which is defined as a medium-sized charity by the NCVO (Crees, Dobbs, et al. 2016). It also required organisations to be currently offering public services and looking to evaluate, change or expand these in some way in the future, in order to undertake design activity in the time restraints of the doctoral study. Although smaller charities are arguably more at risk during recessions, research has shown that medium charities have lost proportionally more income than other categories as statutory support has diminished (Crees,

Davies, et al. 2016), making them a useful research site from which to understand the impacts of design during times of austerity.

The collaborations ran consecutively, therefore each charity had differing charitable aims and customer bases to ensure that the designer's practice was not guided by any previous engagement (Lewin 1946, p.38; McNiff & Whitehead 2011).

A brief description of the three organisations and the collaborations' aims is described below:

- *Charity A* is a local registered with a national federation, hereafter named Network A. They provide mental health and wellbeing services across three boroughs in North East England, many of which are on behalf of a local council. In this collaboration, the designer was asked to help the organisation consider what services they should provide in a new borough (Warwick 2015, p. 66).
- *Charity B* is a local charity that is part of an international federation, hereafter named Network B. They offer a variety of community education services to anyone living in a borough in North East England. Here, the designer was engaged to help the organisation improve its earned income, particularly focusing on how it could improve its membership system, which offered discounts on fitness, arts and children's services to the local community (Warwick 2015, p. 66).
- *Charity C* is a national charity based in North East England. Their mission is to engage children in reading. They provide a variety of services to achieve this aim, both directly to the public and through educational institutions. In this collaboration, the designer was asked to help the charity consider their service experience in their visitor centre and how it could be improved to better meet the aims of the organisation (Warwick 2015, p. 67).

The designer worked with a variety of stakeholders in each of the charities, including: staff and volunteers who deliver services directly to clients, middle management and executive leadership.

The research aimed to explore the value of Design and how it manifests itself in a VCS context. To understand this relationship over time, the data collection strategy was designed to capture data in each case from various project stakeholders directly involved in the collaboration (e.g. Chief Executive, Business Development Manager etc.), at various stages of the project timeline, including six and 12 months after the completion of the collaboration. The majority of the data was collected through the Action Research design activity, including project meetings (Nimkulrat 2007), design outcomes (Zimmerman et al. 2010), and reflection-on-action (Schön 1983). Semi-structured interviews (Robson 2011) were conducted before and after the collaboration by an independent researcher, in order to ensure accuracy and remove bias. These multiple perspectives, both within and across the cases, also allowed data to be triangulated (Denzin 1988) to ensure it was accurate and generalizable. The findings were then validated through a series of peer reviews with both VCS and Design community to ensure their accuracy (McNiff & Whitehead 2011, p.168).

Data analysis

Data was analysed using a general inductive analysis approach (Thomas 2006) to generate theory directly from the data, without being influenced by pre-defined goals. The data was taken through four stages of analysis in order to construct theory: data-cleaning, first-stage coding, building multiple coding collections and identifying themes and patterns.

Data-cleaning (Rahm and Do, 2000) took all data (including 35 hours of audio and 109 pages of written data) and converted into a common format (Miles & Huberman 1994, p.51). All data

(including interview transcripts, project meeting summary sheets, reflection-on-action logs and other project correspondence) was then printed, organised into its respective collaboration and filed in chronological order. This enabled the data for each collaboration to be read chronologically to enable familiarisation with the content, themes and events described by each stakeholder.

First-stage coding continued the process of data-cleaning; the study's four aims were used as evaluation objectives to guide hand coding of the data, further refining the pool of data relevant to the research's question. Throughout a second read-through of the data, when a critical incident was identified that related to one or more of the evaluation objectives, it was first attributed to the relevant objective(s) using a number that correlated to each question (e.g. '4' for How was the Design approach established in the VCS organisation?), and then encoded (Boyatzis 1998). The codes were simple and precise and aimed to capture the qualitative richness of the phenomenon (Boyatzis 1998, p.1). Each highlighted excerpt was then copied onto a Post-It note (or multiple Post-Its if it was attributed to multiple objectives).

Despite these two stages of data-cleaning, there were still approximately 4,000 excerpts of text relevant to the research. Stage three of the process was therefore to *build multiple coding collections* (Guldbrandsen, 2006, p. 56). To do this, each excerpt was considered in a matrix, which placed time (collaboration set-up, collaboration activity, and post-collaboration reflection) on the horizontal axis and stakeholder (Designer, Chief Executive, Service Manager, Business Manager etc.) on the vertical axis. Where commonality was spotted within a quadrant of the matrix, similar quotes were grouped together and encoded, creating multiple coding collections.

The fourth and final stage was to compare multiple coding collections (Guldbrandsen, 2006, p. 56) within and across stakeholders, timelines and cases to *identify themes and patterns*. This was enabled by taking photographs of each multiple coding collection and then stitching them together in computer software to create an image that showed the multiple coding collections for each objective and each case (see Figure 1).
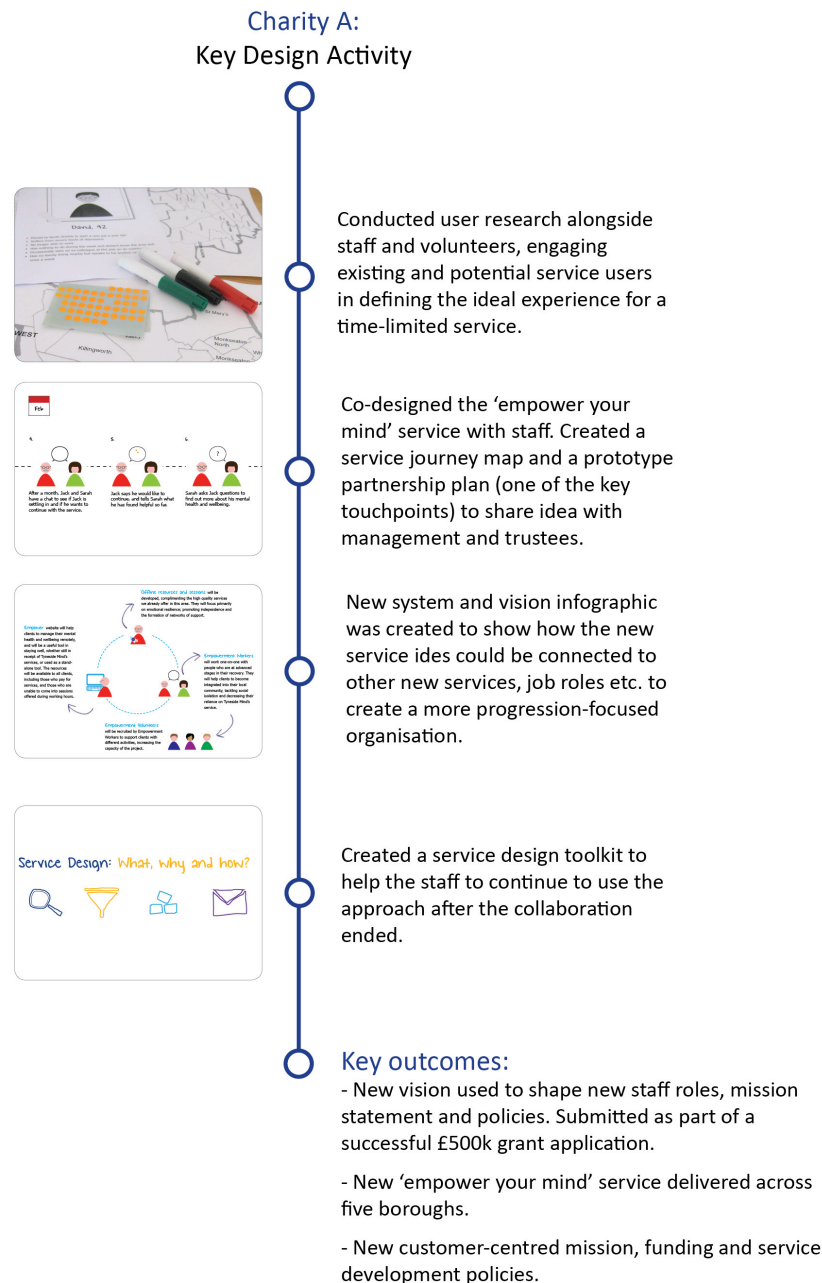

Figure 1: Screen shot of compiled image showing multiple coding collections for the fourth evaluation objective at Charity B (anonymised)

By looking across each image, common categories could be identified, which were then grouped and reduced to create core categories, which were finally re-described as themes (Silverman, 2006, p. 307). These final themes were then analysed to derive patterns (Reichertz, 2007, p. 221). Each patterns was then correlated with existing literature and peer reviews with Design and VCS communities to ensure their accuracy and credibility. The themes and patterns discussed in this paper relate to the 'what' and 'to what extent' evaluation objectives: what aspects of the Design approach had an impact on organisational activity in the VCS organisation? And to what extent the DfS approach had an impact on organisational activity in the VCS organisation?
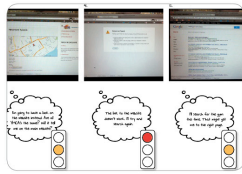
Findings

Before detailing the main findings in relation to the specific impacts of approach on the VCS organisations, and the extent of those impacts, it is important to outline the type of design activity undertaken in each collaboration. The following timelines (Figures 2-4) visualise the key design

activity and the key outcomes for each of the three charities. These provide a summarised overview of eight weeks of activity in each case; a more detailed description can be found in the doctoral thesis (Warwick 2015, p. 88-157). It should also be noted that only the impacts that have been directly attributed to the collaboration by the charities' stakeholders have been considered in the data analysis and presented here.

Charity A:
Key Design Activity

Conducted user research alongside staff and volunteers, engaging existing and potential service users in defining the ideal experience for a time-limited service.

Co-designed the 'empower your mind' service with staff. Created a service journey map and a prototype partnership plan (one of the key touchpoints) to share idea with management and trustees.

New system and vision infographic was created to show how the new service ides could be connected to other new services, job roles etc. to create a more progression-focused organisation.

Created a service design toolkit to help the staff to continue to use the approach after the collaboration ended.

Key outcomes:
- New vision used to shape new staff roles, mission statement and policies. Submitted as part of a successful £500k grant application.

- New 'empower your mind' service delivered across five boroughs.

- New customer-centred mission, funding and service development policies.

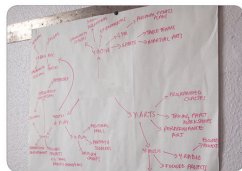**Figure 2: Charity A's key design activity and associated outcomes.**

Charity B:
Key Design Activity

Observational research was conducted with staff to understand the members' experiences. A 'secret shopper' also used the facilities. His journey was visualised using a traffic light system to highlight where things could be improved.
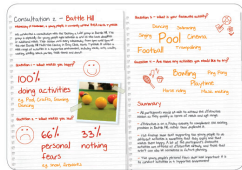
Research was conducted with 12-18 year olds to understand their needs and demands. This included interactive workshops and visual questionnaires. A visual report was produced to communicate findings.

An idea workshop was held with staff to generate solutions that would improve the membership offer. All of the research and potential solutions were captured in an insights report.

Created brouchure prototypes to communicate new co-designed pricing and membership structures.

Key outcomes:
- Young people's research report submitted as part of a successful £190k grant application.

- New membership structures were rolled out and resulted in an increase in memberships.

**Figure 3: Charity B's key design activity and associated outcomes.**

Charity C:
Key Design Activity
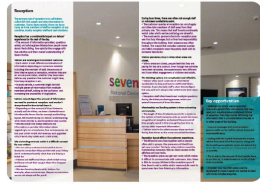
Observational research was conducted with staff to understand the drop-in and school visitor experience.
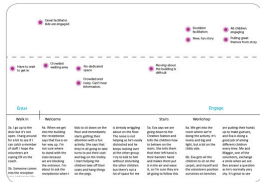
Four customer experience maps were also created to help communicate the visitor perspective in a visual way using a graph that plotted experience either above or below expectations.
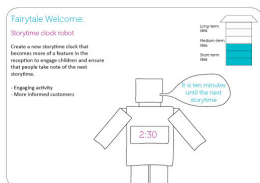
Four idea workshops were conducted with a variety of different staff to generate ideas about what would be the fairytale experiences. All of these ideas were then described and circulated amongst the entire staff.

Nine ideas were then selected and tested over Easter to see how much of a difference they made to the customer experience. Changes were made to some models as the week went on to improve them even further.

Key outcomes:
- Customer experience maps used to train new staff on the diversity of customers and their varying needs.

- Prototypes resulted in £50k increase in earned income, as well as better customer feedback. Seven of the nine are still in use.

- Research findings contributed to two successful grant applications totalling £1.9m.

Figure 4 Charity C's key design activity and associated outcomes.

More customer-focused services

All three charities involved in this research reported that the newly-designed services were still in use 12 months post-collaboration, and that they had changed the way that they engaged with their customers.

In Charity A, the designer helped co-create a new service, 'empower your mind', which was a time-limited offer designed to reduce dependency on the charity's services. An 'Empowerment worker'

role was designed to work with service users during the last six months of their journey to help to integrate them back in their community to help with their continued recovery.

The service is now rolled out across five localities and has resulted more progression-focused service users, which has meant they have supported more people. They've also had an increase in number of referrals for people who want to access the Empowerment workers only, which means they are reaching and supporting people who wouldn't ordinarily engage with mental health provision.

In Charity B, the new co-designed membership structure had a simplified number of options, with customer-focused branding and language to describe offers clearly. It also set a reduced price for concessions, including those in receipt of benefits, in order to enable access-for-all. The structure was launched a month after the collaboration ended, with the Chief Executive saying this had "worked very, very well".

At the end of a period of research and idea generation in Charity C, nine ideas were turned into prototypes that were tested over a busy holiday period to assess their impact. Seven of the nine prototypes were still in place post-collaboration and had a significant impact on the customer experience around the building. One in particular, a sticker system whereby different visitor types were assigned different coloured stickers, allowed the staff to tailor their customer interactions around their building based on whether or not the visitor was an annual pass holder or held a one-day ticket. Along with the other design objects, these have transformed their interactions with customers and have resulted in an increase in visitor numbers and customer satisfaction.

Financial gains

The financial outcomes of the research, which were not anticipated, have had a considerable impact on all three charities. Design has directly supported the organisations to secure £1.2 million in funding; it also informed a bid made by Charity C, bringing the total to £2.7 million.

Charity A were awarded £426,636 by BIG Lottery Reaching Communities fund to deliver the 'empower your mind' project. This represented an increase of 56% in Charity A's turnover at a time when the organisation was considering the possibility of having to make redundancies. The feedback they received from the BIG Lottery was: "really, really positive feedback on how clear our application was, how well rounded and how we were going to achieve the outcomes was very clearly demonstrated" (Chief Executive, Charity A).

Charity B were also awarded £196,673 by BIG Lottery for their application for new young people's service; the BIG Lottery similarly remarked on their "strong consultation". In Charity C, they used many of the research findings to inform two successful funding applications; the first to secure National Portfolio funding from Arts Council England (£1.5 million), and the second for a capital refurbishment scheme for the building (£500,000).

All of the charities' stakeholders felt that the engaging in in-depth user research in a creative way had helped them to secure this grant funding. They felt that copious amounts of evidence that was translated into innovative services appealed to grant funders who wanted assurances about the impact of their grants.

The design collaborations had also had impact on the charities' earned income. In Charity A, their successful grant award allowed them to expand their area of benefit further, which led to new partnerships and contracts that also helped to stabilise the organisation. In the 12-months post-collaboration, Charity B had more membership direct debits than ever, which was provided them with a higher level of fixed income. In Charity C, the Chief Executive confirmed 12-months post-

collaboration that earned income had increased as a result of being able to target one-day ticket holders to upgrade to annual passes.

All of the Chief Executives had observed that at a time of great financial uncertainty and change, their charities had managed to thrive. Significantly, this had been done in a way that did not compromise their service users or their values; "we still leave stuff alone if we don't believe in it as a service" (Chief Executive, Charity A).

Organisational learning

More importantly for all communities involved, the outcomes from this study have shown that design can also have a *transformational* impact on a VCS organisation.

In two of the charities, the design work transcended the service level, and impacted at an organisational level. The impacts in both Charity A and C can be described as transformational; resulting in organisational learning that had radically changed the organisation.

The charities' organisational learning will be discussed in relation to six indicators of transformational change:

- The use of transformative design objects;

- A new perspective;

- A community of advocates;

- Design capability;

- New power dynamics;

- New organisational standards (Warwick 2015, p. 198).

These indicators are based on existing transformational design models (e.g. Burns et al. 2006; Sangiorgi 2011), as well as a review of related literature. To ensure accurate interpretation of the evidence for each indicator, the evidence was independently verified by another researcher to establish the extent of its 'transformational nature'.

The use of transformative design objects
A characteristic of transformative impacts is the use of outcomes that fundamentally and positively alter the way that an organisation, system or service interacts with its user (Ferlie et al. 1996). These are not necessarily traditional design outcomes: "designers are just as likely to find themselves shaping a job description as shaping a new product" (Burns et al. 2006, p.21).

Charity A and C both had considerable evidence of transformative design objects in use 12 months post-collaboration. In Charity A, there were several new 'Empowerment workers' that have altered the way that the organisation engages with its service users, creating an impetus on supporting people to progress from Charity A's provision. Similarly, Charity C have seven of the nine prototypes created in the collaboration still in use, which have altered the way that they relate to customers.

In contrast, Charity B's new membership system has changed the way that some customers consumed some of the services, impacting on the health and fitness offerings in particular. However, there has been no extended use of these objects, limiting its impact to one service and one stakeholder group.

A new perspective

Design's human-centred focus can provide a new perspective that acts as a catalyst for change. Evidence that an organisation has adopted this new way of viewing services or challenges is commonly considered an indicator of gamma change (Levy 1986; Sangiorgi 2011; Junginger & Sangiorgi 2009; Bartunek & Moch 1987).

Post-collarboration, Charity B put a new customer care department in place that was "forward-facing", as a result of viewing membership needs in a new way. However, this new perspective had not resulted in any significant changes to their services or systems.

Conversely in Charity A, there was consistent application of a new perspective; "the ripples from [the engagement] have gone through the whole organisation". The permeation of this new perspective can also be seen in a revised funding policy; they no longer apply for grants or commissions that do not align with the precise needs of their beneficiaries.

Likewise, Charity C also described a whole-organisation new perspective: "[we are] looking through the other end of the lens". This new perspective had been applied not only to services, but also systems within the organisation; this manifested itself two years post-collaboration in the refurbishment of the entire visitor's centre to create new spaces for social engagement

Community of advocates

Transformation is perpetual and indeterminate therefore a community of advocates for the approach and outcomes is needed to continue to realise the change after the collaboration ends (Wetter Edman 2011; Han 2010).

Charity A and C both shared Design practice within their organisation, with the former including it in their staff away day, and the latter inviting Northumbria University's Design department to present to staff. Both Charity A and C shared their experience of the practice with external stakeholders; they both detailed the work in their subsequent successful funding applications, as well as sharing their experience and findings with local partner organisations.

In contrast, there was limited evidence of sharing the approach within Charity B; partly, due to the fact that only one of the stakeholders, the Chief Executive, remained at the charity 12 months after the collaboration. However, even at the six-month interview when three of the project stakeholders were still in post, there was no suggestion that any additional sharing had taken place.

Design capability

In organisational change discourse, it is suggested that organisations operating in a turbulent environment need to possess the ability to respond to departures and opportunities as they arise (Senge 1990; White 2000). Where an advocate might *promote* the approach, evidence that these advocates are able to *apply* this approach themselves would be a further indicator of transformational change.

There was no evidence of any design capability present in Charity B post-collaboration; none of the project stakeholders expressed any ability or confidence to use any design tools and so no design work had been undertaken in the 12-months post-collaboration.

Conversely, Charity C continued to use the same activities undertaken during the engagement to consider and improve the experience for visitors; "[the marketing team is] using the service design methodologies to observe the way that people are using the space". The management team also used the customer experience maps to help them think about spaces in the building. A similar level of design capability was exhibited in Charity A, with several project stakeholders using the design toolkit created during the collaboration to consider particular project challenges.

New power dynamics
Design discourse suggests that a community needs to be empowered to co-design and co-produce their own services and systems, which often requires permission and shifts in power (Burns et al. 2006; Brown 2009; Sangiorgi 2011).

As with design capability, there was no evidence that Charity B had seen any redistribution of power since the collaboration. However, Charity C exhibited the greatest redistribution of power: post-collaboration, staff were actively involved in contributing to challenges both within and outside of their remit. Likewise, Charity A reported a sense of empowerment in two of the project stakeholders, with the Business Manager taking "a very integrated approach" to writing bids and the Service Manager using her new way of viewing things to question the charity's practice.

New organisational standards
Burns *et al.* (2006) suggest that the final characteristic of a transformation design project is that they fundamentally change the community's or organisation's culture. A practitioner must not only create a community of designers with a new, shared, way of thinking but also co-create a new vision for the organisation with structures that support this new organisational worldview (Junginger & Sangiorgi 2009; Tan 2012; Manzini & Jegou 2003).

Only one of the cases has altered their mission and vision as a result of the engagement. Charity A has rewritten these statements to reflect their person-centred provision; "we work with you as a person, not a diagnosis or a problem or set of problems or an illness". Along with the new funding policy, the wellbeing services have also been updated to reflect the new organisational focus on progression and person-centred care. Charity C also now engages staff cross-departmentally to consider the experience that is offered, providing front-line staff in particular with the opportunity and permission to make changes to the service. The building refurbishment also provided more social space than before, which can also be viewed as a new organisational standard.

As with the other features, Charity B has significantly less evidence than the other cases: a new pricing policy for the membership system and a new customer care department were new standards that resulted from the use of design. However, these were service-focused, and there were no further changes to policy, aims, mission, or vision of the organisation, limiting design's transformational potential.

Conclusions
The foundations of the conclusions presented here are based on the diverse outcomes reported by each charity. These can broadly be summarised as:

- More customer-focused services (e.g. Charity A's new progression-focused partnership service, Charity B's new membership structure and Charity C's new sticker system);
- Financial gains (e.g. Charity A and B's BIG Lottery reaching Communities grant, and Charity C's Arts Council Capital Refurbishment Scheme);
- And organisational learning, which in two of the charities led to transformational change (e.g. Charity A's new mission statement, Charity C's new staff roles).

The financial impacts suggest that engaging in a rigorous, user-centric approach is of value to funders and partners. Similarly, the improved customer experience provides more stable earned income.

Whilst the monetary results of this research were not anticipated, some of the results from this study could be considered predictable; the value of the Design approach in creating improved

customer services is clearly evidenced in both the private and public sector organisations (Bate and Robert, 2007; Kimbell, 2009, 2011a), and might have been anticipated in VCS organisations. However, the financial constraints of this sector mean that there is a need for evidence and clarity of the value of a new approach before organisations will engage with it. This study therefore adds credence to these assumptions, and contributes to a growing body of evidence (e.g. Better by Design, 2014; Yee, Jeffries and Tan, 2013; Yee, White and Lennon, 2015) that design can have an impact on services offered in this sector.

More significantly, the evidence presented here shows that design can incite the transformation of services, systems or organisations in the VCS. Two of the three charities had evidence of each of the six indicators of transformational change, showing that when design transcends service, it can be used to rethink an organisation's mission and vision. Moreover, it suggests that using the approach can equip the organisations with the new perspectives and methods required to continue to think and act in a transformative way.

Although the data for this research was gathered between 2012 and 2013, these findings have particular relevance for the sector at a time when competition and demand both remain high, and the future remains uncertain. It is hoped that the impacts detailed here will provide evidence for designers and VCS communities to work together on small-scale pilot projects to build awareness and confidence in the approach, that can then scale to larger, systems-based interventions that can bring about the long-term, transformative change the sector needs.

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