Learning from Year One

June 2017 – June 2018

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Introduction

At the end of the first phase of The Social Change Project (July 2017 to June 2018), we were keen to capture what we had learned in terms of delivering the project itself. The *Social Power* report exhorted us to invest in knowledge and share it with others – so we are.

Summary – what we would do differently

- **The freedom to 'follow our nose' was absolutely key to making the Social Change Project effective**, but brought its own challenges – not least reporting and showing progress against plans. At some points, we didn't know where we were going to land! In future, we'd flag this up front.

- **Build clashes of ideas and priorities into the process**, either in terms of discussion structures or our own expectations. This approach is fruitful but has a capacity cost.

- **Invest more time collecting qualitative evidence about how change happens** (e.g. through interviews with change-makers). Again, this has a capacity cost.

- **Take a looser research approach**, as it was nearly impossible to conduct the desk research using traditional models – we were comparing apples and oranges.

- **Hold more 'deep dive' days**, as this was where the most creative intellectual work occurred, with a small group thrashing out what the evidence was telling us.

- **Build in more capacity** – the Project consumed a great deal of organisational capacity and required a reasonable level to knowledge and experience to 'hold' the story as experience and evidence emerged. In hindsight, we needed more senior in-house experience (other than CEO), and more capacity, to respond to emerging ideas and problems.

What would we tell others undertaking a similar project?

- **The greatest value came mostly from things we didn't pay for** (people's experiences, thoughts, concerns, ideas) and were worth many times the initial investment.

- **The 'follow your nose' approach is unnerving and requires funder trust.** In our case, it freed us to build a more creative framework and eventual findings.

- **You can seek advice or support but you cannot outsource the vision** – keep your hand on the tiller of the 'big questions'. We had to accept that this project could not just run itself, but needed organisational guidance and engagement throughout.

Reflections

What went well?

- **It was an idea 'of its moment'** – growing concern about shrinking civic space and the direction of large parts of civil society (eg contract/fundraising led) made it important to better understand what effective change looks like. Also a perception that progressive campaigns not winning post-Brexit and Trump.

- **It filled a gap** – there is a dearth of accessible, comparable evidence (and this remains a problem). Change-makers are looking overseas, particularly to the United States and Canada, for such evidence. In the UK's own shrinking civic space, it is important that change-makers have the best possible information about how change happens within our own systems and cultures.

- **A strong case had started to feel urgent** – the quality of political discussion about the nature and purpose of civil society, which takes a very partial and/or uninformed view, increased the need to 'make the case' for campaigning and lobbying for change

- **Widening the typology from 'campaigners' to 'change makers'** – transformed and broadened the conversation. It was "like pouring water on parched earth" (Advisory Group). It also allowed the project to recognise transformative services as part of its scope.

- **The early positioning gave us a useful frame** – funders preferred to start at 'social change' and recognised that 'campaigning' is not a fully inclusive concept.

- **SMK approached the project as practitioners rather than academics** – providing a very practical lens through which to view conclusions.

- **Funders were relaxed and hands-off regarding the design and planning of the project** – trust, moral support and a light touch reporting system as the project progressed were important elements in its flexibility and adaptiveness. In many ways, they engaged most effectively when acting as co-creators.

- **The flexible structure of the project allowed us to explore and 'surf' ideas** – where participants identified an issue or idea of particular interest, we were able to focus in on it and develop our questioning further. It was this flexibility that resulted in the tools (i.e. the Social Change Grid and the 12 Habits of Successful Change-makers) that appeared in the final report.

- **Benefits to SMK:** it was transformational. The Project offered an opportunity to explore *our* role in the world, to develop relationships with many people and organisations, to learn and develop, to reposition SMK as a thought leader and provide fuel for new

insights. It increased and strengthened our connections within the voluntary and community sector, including senior audiences and politicians, along with a refreshed legitimacy. We initially struggled to recruit a new Director of Programmes but, once the Social Change Project was underway, applications jumped from 12 in our first round to 80 in our second.

- **'Social power' is an inclusive concept** that allows change-makers reading the report to 'unpack' their own meaning from the findings – this could be important when it comes to discussing change-making with politicians.

- **It moved on the concept of what training and support for campaigning needs to be** – traditional learning is very staid and rigid.

- **Quality of participants and their engagement** – this was very high and ran through all of the events and the launch of report – the appetite for this investigation was strong and clear!

- **Input came from a very broad range of people at different levels** – from individual community activists to very large charities, from board members to volunteers. It engaged in different geographies and different communities. It did so through different for a – from small-scale 'deep dives', to expert away days, open issue groups and via the advisory group. This created a strong sense of engagement and gave us confidence in the authenticity of the results.

- **Information was well-managed** – at different points in the project it was generated, sifted and crystallised, with critical interactions being managed and preserved.

- **Community of Practice** – the events were organised quickly and effectively, good range of attendees.

- **We did not expect new ideas, tools or material to be such a large part of the final report**

- **Support from the social change community** – for Sue Tibballs as the 'holder' of the emerging thinking, the support, encouragement and mentorship of peers was invaluable.

- **Advisory and Project Design Groups** – both brought multiple perspectives and experiences, which made the conversation very rich.

- **Two-day retreat/workshop** – an essential element – was an incredible opportunity to check and challenge our conclusions, there was time to properly explore stimulating content and to receive thoughtful feedback from different kinds of thinkers. It was especially good to know that we would be able to capture the responses of people who need more time to digest and reflect before reaching conclusions.

- **Deep dive days** – with Jim Coe, Rachel Cain, Megan Poyiadzis, Sue Tibballs and Chloe Hardy – these created a real sense of team and shared endeavour.

- **We achieved a creative analysis across a vast breadth of material**

- **Reporting** – we maintained strong reporting lines between the project and funders, participants, and key audiences, through regular updates, newsletters and face to face relationships.

What could have gone better?

- **Timescales** – at January 2017 funder meeting we agreed a start date of June 2017, which posed a major challenge getting the people and skills we needed recruited in time to complete planning and infrastructure.

- **Continuity** – a change in the project lead (from Rachel Nye to Rachel Cain) left Sue Tibballs as the only consistent 'knowledge holder' in the project. Its iterative nature meant that only so much could be captured in plans and notes.

- **Resources** – the budget was generous but, already being a very small team, it had to make up a lot of capacity. It was eaten up quickly, and it was the commitment of staff who were able to go the 'extra mile' to deliver what was needed, that brought the project so successfully home.

- **Producing a practical plan was a challenge** – Richard Wilson at OSCA designed the Community of Practice but there was such a huge question at the Project's heart that the multi-disciplinary Design Team could not agree on the exact delivery method. In the end, we had to 'just do it'!

- **Funder expectations** – there were many points of interest amongst multiple funders, and perhaps the 'hands off' approach meant that any tensions this introduced were not very visible in the early days of the Project. For example, at different points it became apparent that we were expected to include service delivery in our remit, to look at change both small/local and big/national, and review existing academic research in significant depth. This wasn't written into our agreements, but we were keen to please. Although the extra work stretched us intellectually, it perhaps brought us to findings we might not otherwise have reached.

- **Objective and comparable evidence about specific instances of change was hard to come by** – and as a result we missed further opportunities to engage with the Community of Practice. We would have liked to have received more input from funders in terms of evidence and analysis (with them acting as co-creators). We needed more time to capture case studies well.

- **Desk research didn't generate ideas or conclusions as well as discussions between change-makers** – arguably, we spent too much valuable time on this.

- **We didn't anticipate the strength of dissonance emerging in the Government's narrative on civil society campaigning** – i.e. they state they want to see it but policies work against it

- **Qualitative research** – for example, in the form of directly sourced, in-depth case studies, would have been of great value. We gathered sufficient evidence of this sort to support our conclusions, but more of them would have added depth to our findings and been useful for change-makers to draw on.

- **Many people were stumped by our primary question, 'How does change happen?'** – at early discussion events the majority of participants couldn't answer it at all. This was in contrast to our expectation that we could simply capture it. The issue was too big and esoteric for most people to even begin to answer in that way.

- **Burning issues discussions** – in these events we convened to consider an aspect or tool of change identified as important in earlier meetings. With the notable exception of our event on 'Ethics', participants quickly lost sight of the context in which we were asking the questions. In phase two, it will be interesting to see whether the frames of reference created by the Social Power report enable those conversations to remain more focused.

- **Engagement outside events** – despite our regular newsletter and social media activity, the Social Change Project didn't develop its full 'personality', perhaps partly as a result of staff changes and overall lack of capacity. As an emerging entity, this would have taken time we didn't have, but it meant we missed a further opportunity to deepen engagement. This left our communications feeling a little 'pro forma'.

- **We should have sought more funding** – the first year budget seemed more than sufficient to start with, but it quickly became apparent that it was not sufficient to take full advantage of the level of appetite for engagement from across the civil society.

- **Year Two funding is focused on more 'conservative' approaches** – more comfortable with dissemination than thought leadership or conversation (although we are finding ways to generate these).

What we learned

If we could do it again...

- **Oversight** – It's tempting to say that we should have pinned down funder expectations to a greater degree, but that would have been a mistake. It was the very act of being able to 'follow our nose' that became so productive and creative.

- **Involve funders as co-creators** and as participants in the conversation.

- **Clash of ideas** – We would make clashes of ideas and priorities part of the process – either in terms of discussion structure or simply our own expectations. However, it would be important to recognise that the host organisation must hold that process and the project needs to be designed to ensure it has the necessary support.

- **More evidence gathering** – We would spend more time collecting qualitative evidence about how change happens (e.g. through interviews with change-makers). It would have better supported the ongoing conversation. This would require a shift of time and other resources.

- **More 'deep dive' days** – The most creative intellectual work occurred not at the one-off events, but during the 'deep dive' days with a small group thrashing out what the evidence was telling us. We would schedule more of these through the process.

- **Research approaches** – It was nearly impossible to conduct the desk research using traditional models – we were comparing apples and oranges (or even giraffes). We need a looser approach, looking for patterns and shared characteristics, which probably needed someone with more hands-on experience of change and the change-making ecology.

- **Time** – In hindsight, the Social Change Project took up 40% of the Chief Executive's time and around 50% of the overall organisation's time. £120k seemed a lot but it didn't cover it all. Recruiting the project lead at a more senior level would have been desirable in terms of being able to bring greater experience to emerging ideas and problems, and being able to respond more independently.

Methodology

These results were gathered through:

- Initial exercise to gather reflections of existing SMK staff involved in the Social Change Project at any point

- Departed SMK staff and consultants who worked on the Project invited to share their thoughts

- Results shared as part of Advisory Group wrap-up process and further input invited

- Lessons drawn and summarised.