

Test and Learn – 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+.

As you can see from the above paragraph, test and learn has been a corner stone of the Ageing Better programme and a term used frequently to describe ourselves. It is also a term that is being used more and more within the sector and by funders. We believe that the test and learn model has been fundamental to the successful operation of Ageing Better and enabled the speedy adaptations of delivery which we saw during the 2020/21 response to Covid-19. As we move into the seventh and final year of Ageing Better, we take the opportunity to reflect on what test and learn has meant practically within Ageing Better as well as what it has involved and brought to the programme as a whole. We then look to highlight some key messages and ways to enable other organisations and funders to use this learning to work in a similar way.

Context

Background to the programme

Ageing Better was set up to learn more about what did and didn't work in trying to reduce social isolation in people aged 50+. There was a growing awareness that social isolation had a detrimental impact on the long term health and wellbeing of those it affected but much less understanding of 'what worked' on the ground to help tackle and reduce social isolation and loneliness.

As a strategic programme, Ageing Better was set up specifically to help contribute to the evidence base around tackling social isolation in people aged 50+. Importantly we had six (now seven) years in which to operate.

Also fundamental to Ageing Better was the importance of co-production and co-design - recognising the value of the lived experience of people aged over 50 both in the development of, understanding of and the shaping of solutions for the programme.

From the start of the programme there was a recognition that we didn't know what would work and we weren't implementing one model of delivery in 14 areas. As a result we needed to develop and allow flexibility in order to be able to both respond to the needs being identified in working with socially isolated older people and build the evidence base. Test and learn was adopted as an approach to facilitate this.

In acknowledging that there was an evidence gap and that we didn't know what the

“right” answer or model was we were also effectively saying that not everything would succeed. Exploring what didn’t work and why, would be as important (arguably more so) as what did.

About the delivery model

Ageing Better operates as 14 partnerships across England. There is no one Ageing Better model, so allowing each partnership to respond to the specific location and people they are working with and so adapt to their local context. Each area had the freedom and flexibility to design local solutions to tackling social isolation in their communities. This led to different projects and approaches across the programme.

There was a framework for how Ageing Better areas were expected to operate. This included working in a strengths based way and designing their projects in partnership with people aged 50+. Co-production was a fundamental tenet of how Ageing Better set out to work.

Ageing Better provided programmes led by the third sector with the resources and the responsibility for commissioning delivery partners. The programmes were guided by a governance structure that included people aged over 50 and wider partners.

In 12 of the 14 successful areas, project plans identified a commissioning process to find delivery partners to deliver elements of the programme. 2 of the 14 successful areas, however, “recruited” a set of delivery partners at the “vision and strategy” stage and so did not commission activity. In some areas the lead organisation was itself a deliverer of some interventions.

The majority of Ageing Better programmes developed competitive tendering processes. Several areas took the opportunity either before or during the commissioning processes to promote and develop collaborative working between third sector partners. This was time consuming but has proved highly effective. However commissioned, once contracts were awarded collaborative working between delivery partners has been at the heart of delivery, partly facilitated and developed via regular delivery partner meetings.

Some areas decided to take a learning approach to the whole programme with each strand of delivery specifically focused on contributing to that overall learning and activity stopping when the learning had been completed. Other areas ran ‘testing’ or ‘pilot’ phases to feed into the selection and decision making process as to what was working and so should be scaled up. Some areas planned to commission the same delivery for the full duration of Ageing Better funding and explore and learn from long term delivery.

Each area was required and supported to develop an initial detailed two year project plan outlining the set of objectives each area was trying to understand and explore. Some had a specific focus such as Social Prescribing or Community Development models. Others explored a wide range of interventions working with a wide range of delivery partners who were in turn working with particular client groups. Each plan was unique to each area. This reflected in part the range of lead organisations, different localities as well as the level of co-production that took place.

Understanding the term

At the start of Ageing Better there was a broad understanding of but no specific definition of test and learn. This in hindsight was not necessarily a disadvantage and actually enabled time and space within the Programme as a whole and for each partnership to explore and evolve a way of implementing it in a way that worked for them.

Ultimately in Ageing Better test and learn has come to represent a shorthand or terminology for an agreed way of working to reflect and understand more about what they 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.

Delivering test & learn in practice

We have had over 6 years of delivering in a test and learn environment and have insight gained from working in this way. It is unlikely that there will be the same level of resource and time investment in a programme like Ageing Better again, but we believe that our learning can still be applied to a wide range of projects in the future. We set out our key insights of this way of delivery here. We have organised the learning into three parts:

- Setting the boundaries and understanding the objectives - identifying what will be tested.
- Developing systems and processes to understand if the objectives have been met - identifying how the learning will be collected.
- Applying the outcomes and implementing change as a result of the findings - identifying how the testing and learning will be applied.

Setting the boundaries and understanding the objectives

Be clear and honest about the purpose and scope of test and learn in your project

In some areas test and learn was a formal process designed specifically to capture learning. Here there was a clear framework identifying what learning was sought from a particular project or intervention and once that learning had been gathered the project ended. The driver was to learn from the delivery of a project or intervention and not necessarily to sustain the project per se within Ageing Better. Even a project which had delivered well might not continue to be commissioned because all the learning had been gained. It could also be that the model had not worked and it was time to explore a different way of working.

There were situations where there was a lack of clarity or shared understanding about what the objective and purpose of the funding had been in terms of test and learn. It can be difficult to hear that a stated objective to learn has been achieved resulting in funding decreasing or ending even where delivery was “successful”, and some delivery partner relationships struggled as a result.

Sometimes test and learn is advocated for on the basis that it promotes innovation, but we would argue that it shouldn't be approached or adopted with that goal necessarily in mind. One of the things the approach can identify is that a way of working is achieving a specific outcome and so needs to be built upon or scaled up. Test and learn can mean identifying and understanding that the approach/way of working we thought we knew worked actually does.

It is important to be clear about any elements of delivery or operation that are either not suitable for or open to test and learn and to be upfront about this. Within Ageing Better the operation of the national evaluation was fixed. This did impact when we were advocating for others to test and learn but were not able to implement it ourselves in this aspect of the programme. Areas had to navigate this

through the relationships they had with their local delivery partners but we heard how it created a tension when encouraging test and learn in delivery partners who were feeding back their test and learn about the evaluation and being told that this was not open to change.

Our learning emphasises the need to be clear and upfront about any test and learn boundaries. We have learned that it is okay to be fixed on some aspects but acknowledging and embracing the contradiction is important.

Funder relationships within test and learn - funders are also exploring new ways of working

The Fund also used Ageing Better to explore a new way of working. There was a significant commitment to support the test and learn ethos that underpins Ageing Better. The Ageing Better Funding and Relationship Manager (FRM) team were each assigned to a group of partnerships. This role included “traditional” grant management and oversight but also aimed to develop a partnership with each area. This was designed to support the test and learn ethos of Ageing Better and in recognition that areas would be trialling and exploring what did and didn’t work in terms of reducing social isolation and loneliness over a 6 year period.

The approach was not to keep rigidly to earlier designed project plans but to test, review, learn and adapt to the challenges as well as to any identified gaps. The FRM, by being closer to the Programme and staff and having the appropriate decision-making responsibilities would be in a position to:

- Encourage and support staff to suggest appropriate changes or risk.
- Understand the context.
- Authorise required changes in a timely way.

Our learning from Ageing Better Programme Managers is that this did feel different from other Funding and that The Fund was a partner in each programme.

Acknowledge the power dynamics

We have mentioned earlier the fact that the Ageing Better partnerships involved a wide variety of relationships including those between the core team/lead agency and delivery partners, Board and the Funder. The relationships themselves are complex involving not just contracts but also expectations and ways of working.

Within the overall relationships there is also a spectrum of power relationships which need to be acknowledged when implementing test and learn. There are contract performance meetings between the Programme lead and delivery partner (recognising that there is a contractual relationship involving targets, operating within a test and learn culture but where the contract manager has the power to end a contract) and between the Programme and Funder. The ability of the FRM to be able to take timely decisions allowing amendments in delivery or funding was welcomed by areas but there was awareness that power was held that could be wielded at other points (even if there was no intention of it so being wielded). The potential was there and had an impact.

Key message: If utilising test and learn it is important to be clear on what is fixed and what is moveable. We found it was okay to have elements that were not subject to test and learn but we needed to be upfront on why this was the case. Trust and boundaries are key when delivering test and learn - it requires honest conversations to take place and building trust takes time. It is important to remember the power dynamics at play in any funder relationship.

Developing the systems and processes to understand if the objectives have been met

Understand the roles of performance management and test and learn

Areas that used test and learn most effectively established the goals and outcomes they wanted to explore and had clear measures in place to help them understand if those goals and outcomes had been achieved.

Test and learn is not a free-for-all providing individuals with a “get out of jail free - test and learn card” to do what they want. Instead it is an approach which, like any management tool, needs to be effectively managed and implemented.

Our experience in Ageing Better is that there is an important distinction between where delivery was ineffective because the model or approach was wrong and situations of delivery not working because of poor implementation or performance.

A key test for test and learn is its use as a tool in helping to decide what the issue is - wrong model or approach or poor performance. It is important to highlight that test and learn is of course a tool which is still dependant on effective management skills to implement. Areas made use of specific tools to help with this including using performance improvement plans. These encouraged reflection on the issues and challenges and helped put in place a plan to then make improvements to the delivery. This did not mean everything worked but even when it didn't, the learning was collected and the reason why delivery did not work was understood.

At a practical level both The Fund and areas sometimes found it hard to know when the right time to step in was and how to manage the risk around elements of delivery that were not currently working. Areas were clear they wanted to give people time to succeed and learn but that this had to be balanced with the need to contract manage the delivery. It was important to not repeatedly try something that wasn't working (banging your head against a brick wall). We found it was important to put boundaries around projects and to ensure projects remained focused on their objectives. In other words, ensuring projects remained focused on the core outcomes of Ageing Better around preventing or reducing social isolation.

Areas were also honest that some of the initial specifications they developed for the programme weren't always correct at the start and that some of the “failures” were around the design of projects rather than the delivery. It was also partly understandable bearing in mind the evidence space Ageing Better was operating in but did mean that it was difficult or impossible for some delivery partners to deliver on the initial contract specification. This created tensions in a sector that is keen to be seen to be delivering effectively and difficult from a contract management perspective. In some cases areas found that if people are doing a bad job it could take a while to work out whether it was the model or them. Test and learn mechanisms and processes, however, could be used to firstly identify this as an issue and then allow the targets, plans etc., to be amended appropriately.

Use a range of tools to help you structure

Areas developed a set of tools that allowed them to implement and document the test and learn that was happening in each of their projects or delivery strands. Most areas developed a system of quarterly reporting that included a specific focus with delivery partners to share what they were learning from delivery. In combination with contract management meetings, delivery partners were often encouraged to reflect and consider what they would change or what they would improve on. Areas found the need to find a balance with this as Ageing Better progressed e.g. recognising that delivery partners did not necessarily need to change practice every month or quarter.

One area 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.

One practical challenge of test and learn was the volume of information areas could generate. Areas found it was important to have a system for categorising the learning so that it could be easily organised and shared. Areas found it was important to only ask for information that could be used. They also found it was important to keep talking about the learning as this keeps the learning at the forefront of people's minds so they remember to reference it and think about it when planning new projects or programmes.

Data is your friend - but keep it in perspective

Targets and data collection remain important. Data can act as a positive tool and reference point to help people think about what they have achieved and who they have reached. Test and learn allows (and necessitates) a shift in focus away from just looking at targets to using targets and outputs as a way of understanding what worked or didn't and why. Helping people constructively think about who they were reaching.

It also requires a shift of focus from Key Performance indicators to focusing on what would make a difference for the community or individual you are working with.

Test and learn requires trusted relationships - working with delivery partners

It takes time to collect information, to reflect on what it means and to then 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.

Test and learn could work well in Ageing Better because an environment of trust was

built at all levels. Trust had to be in place between the delivery partners and areas and between the areas and the Fund. Building trust took time but it allowed a culture of learning and reflection to develop.

Nearly all areas held regular delivery partner meetings. These created a forum where delivery partners could share what they were learning and with an expectation that they would be willing to share this with each other. But we often found these relationships took time to develop. The relationships don't happen overnight and require adequate investment of time.

One of the positives that test and learn brought was collaborative working and different delivery partners bringing different strengths to the programme together with the permission to adapt together. For example, one delivery partner skilled at the medical side working with another who has the community connectivity experience links which involves both making some adaptations in order to provide a better offer. An additional aspect of this wider collaborative partnership, has been an operational level of self-regulation between partners, holding each other to account as they are aware that they have to jointly deliver together in order to achieve the overall outcomes.

One of the key challenges was around delivery partners being willing to share challenges and learning with each other. People 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 insight and learning into what is and isn't working well. We heard that several areas helped build up this relationship and means of reflection individually with delivery partners before bringing them together as a group.

Ageing Better involved commissioning and there was therefore an element of competition introduced to the delivery. Several areas found it difficult to encourage delivery partners to reflect as a group. There was also a general reluctance from delivery partners to engage in peer support. Those areas that explored this as a tool often finding that delivery partners were reluctant to engage in processes where they were reviewing each other. There were also examples of where more formal opportunities for personal development, such as Action Learning Sets being offered to delivery partners from a mix of projects, created an environment in which peer support was successful.

There was also a challenge around finding delivery partners who wanted to learn and embrace a different way of working and share their learning. Test and learn required a shift away from "simply" delivering against an agreed contract driven by targets and instead requiring a focus on reflection and constant review. Questioning not just whether you were doing what you said you would but importantly were you still delivering what was right for the people you were working with.

Achieving a target was considered less useful if delivery partners weren't able to explain how they had done it. This required a shift in mindset away from achieving numbers to critically reflecting on delivery. But areas also found they needed to find a balance and not to put pressure on delivery partners to change delivery unnecessarily.

Key message: There must be a range of tools in place to help understand if you are achieving what you set out to achieve. Encouraging reflection among partners will take time to develop but is an important feature of delivering projects in this way.

Data plays an important role and helps you understand what is being delivered but it is important that it is not used in isolation - understanding the context of data is key. It is important to think carefully about the amount of data being collected and how it will be managed and processed

Applying the outcomes and implementing change as a result of the findings

Invest time developing a culture of reflection

In talking to areas, one of the key elements that we heard needed to be in place for test and learn to operate effectively was a culture of reflection - having the skills, space and trust to not only record what has happened but to analyse the why. This doesn't just happen and a number of elements need to be in place first. For it to be most effective, ensure that there is balance so that some is done retrospectively and reactively whilst some is also happening proactively i.e. at the same time as the project is running.

A commitment to learning needs to be in place and developed from the start of the programme in order to help create an environment and ethos where people feel (relatively) comfortable about sharing what has worked and more importantly what hasn't.

The project or programme lead has a key role to play in supporting and encouraging an effective test and learn culture through leading by example. Equally vital is the sharing of 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. It needs to be embedded and owned throughout the programme.

Developing a culture within a Programme of this size involves developing and maintaining a complex range of interrelationships which include those between delivery partners, between colleagues, and with the funder. They also involve relationships that are also often contractual. To develop these relationships which allow enough trust to admit where things haven't worked and to look in detail at the why is not easy and will take time and investment. But developing this culture and trust is fundamental to the effective operation of test and learn and so ultimately to the collection of learning and insight which others can go on to benefit from.

We have learned that test and Learn requires the development of reflective practice within delivery partners and wider organisations. There is a constant focus on reflection. If something is working what are the ingredients of success. If something isn't working - why?

Timetabling reflection and more formal review points

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 seeing happen and 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, reflection and any necessary action can take place.

Part of test and learn has included making incremental tweaks in operation so allowing delivery to be shaped to best deliver on locally identified outcomes. Here individual projects were encouraged to reflect and where needed to tweak their

delivery. This is in effect practical on-the-ground problem solving - giving people the framework and permissions to spot an issue, think of a solution and implement it.

On a more formal basis, it has also included setting or using particular milestones within the programme to pause and undertake a more formal review and assessment (through the appropriate governance structure) of recommendations to amend delivery, look at the programme as a whole and the elements to continue and recommission to the end.

We also found that specific milestones and points in the programme were useful in providing both the incentive and the time to pause and reflect on what had been learnt and review the direction of travel. Recommissioning was one such key milestone as it also proved a focus and incentive for other stakeholders to also concentrate minds. Additionally, it allowed learning to be shared more widely in a structured way as part of a round of commissioning. Areas were able to share the learning to date and then highlight what they hoped to explore next through subsequent rounds of commissioning.

Staff engagement and motivation

One of the things we heard was how much people enjoyed working in a test and learn environment. This was because it provided the incentive, environment, structure and mechanism to take action if things weren't working.

We heard that this approach was different for many people with third sector experience. Many people are drawn to the third sector because of their passion to make a difference and work towards wider outcomes and so working within a test and learn environment can facilitate that. We heard that "as a career opportunity this has been the most rewarding part of my career to test and learn from partners and the wider network in this way."

Outcomes - Maintaining focus on what you want to achieve and why

Test and learn allows you to amend the way you deliver in the light of evidence to better deliver on your desired outcome. It therefore further emphasises the importance of your outcome. For Ageing Better that had the added advantage that it operates in tandem with our co-production and co-design aims. It was a further way of ensuring that the voices of the people we were working with were further magnified/empowered as it meant that a) there was a clear focus and b) if projects found that the way of operating could be improved or wasn't achieving as much as it could then there was both a clear impetus and mechanism to amend.

We heard how closely co-production and test and learn worked together in order to both involve older people and deliver for and with them. Test and learn allowed people the flexibility to change things where they weren't working and to include participants in that process through a co-production approach in looking at how and why they didn't work. For example, a programme would be made up of a range of projects and interventions involving several partners. Co-production identified the necessity for a dialogue between partners to facilitate a consistent and smooth transition between elements of the programme for a participant and test and learn provided the mechanism to allow the changes to happen.

This further contributes to the co-production cycle as individuals can see that things are changing as a result of their input and voice so encouraging greater engagement and commitment. One area commented that participants now talk about test and learn indicating that there is a whole Programme level approach, understanding and involvement.

Areas used this as a model in asking delivery partners (and themselves) to reflect on their learning in terms of how well the intervention model 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).

Key message: Testing and learning is nothing without application. We found it was important to timetable formal review points to encourage a critical review of what was being delivered and what that meant for delivery. It is also important to invest time in developing a culture of reflection that allows people to feel confident sharing what hasn't worked. Flexibility is important but it is also important to retain a strong focus on the outcome the project or delivery is trying to achieve.

What this means for others

We recognise that Ageing Better has been unique. It has provided geographical areas with stable long-term funding that was focused on learning what made the most difference in reducing social isolation and loneliness. But there is some common learning that is relevant to projects big and small, commissioners and funders:

- At the heart of test and learn is a third element - 'apply'. It is not enough to learn, someone has to do something with it. In a project this might mean changing the delivery model but for programmes, commissioners and funders it needs to involve creating a clear point where the learning can be reflected upon and applied.
- Clarity on boundaries - Test and learn should also have clear boundaries. This often involves identifying a set out of outcomes or objectives and a set of tools to know if those have been achieved. Reflecting and critically analysing progress towards those outcomes or objectives is then key. Flexibility to respond to changing context is also vital, as happened with Covid-19 but it is done with a clear framework and understanding of what the delivery is trying to achieve.
- Understand the impact of targets - Covid-19 showed the capacity of the third sector to adapt and deliver through test and learn. But the reality is that rigid frameworks linked to targets stop this from being easily delivered in most projects. In order to effectively test and learn the role of targets has to be understood in context. Data is important and can be hugely useful but it is not the only way to either understand or assess whether delivery is effective. Focusing solely on targets prevents a focus on flexibility and responsiveness to evolving local need and if you are a purely target driven funder there will be a limit to how much effective test and learn can ever be achieved.
- Delivering with and for the people in your community - where you are looking to reach, support and work with a group of people in the community then you need an approach that is co-produced, supportive, adaptable and flexible. This will then allow you to respond in a timely way to their needs and the changing context based on insight, communication and data. Test and learn together with co-design and co-production supports delivery to become more effective.
- Embedding and delivering within a test and learn model requires time and resource on all sides. A relationship of trust has to be built between the funder and project and this takes time. Funders have to be realistic about

whether or not this is possible. We also heard that Funders need to back test and learn both in terms of providing longer term funding and in their approach to targets.

Further Reading

More information on the Ageing Better Programme including our national learning reports are available at [Ageing Better](#)