LEARNING FROM THE LABS
How to fund and deliver social tech for charities and social enterprises
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Introduction
This guide comes at the end of the Innovation Labs, a 3 year initiative led by Comic Relief, Nominet Trust and the Paul Hamlyn Foundation to find and fund seven digital products for young people with mental health issues.

The guide is for anyone in the third sector looking to innovate and develop digitally based products and services. It draws on the experience of the seven Labs-funded projects and best practice from the startup and social tech sectors.

If you work for a funder this guide will help you explore and understand ways to fund and manage digital funding programmes.

If you are a service user or work for a third sector organisation it will help you get funding and deliver a successful project.

To help you the guide provides a framework of design, development, marketing and business methods that have been shown to work better than traditional, non-digital approaches.

The guide also offers value to strategists and policy makers looking to encourage programmes that fund digital solutions to the social challenges we face.

James Boardwell and Joe Roberson, October 2014.
www.innovationlabs.org.uk
About the Innovation Labs
The Labs initiative represents the united efforts of three major UK funders, eight mental health organisations and many more young people, digital designers and mental health workers. Those efforts were focussed on two aims:

- to improve young people’s mental health through creating digital products.
- to increase the third sector’s capacity to build digital products – as both funders and service providers.

Since July 2011 we’ve worked with over 100 young people, youth mental health professionals and digital agencies. Together, through two innovation labs and an incubation process, we explored 126 ideas, developed seven of them, and awarded grants to seven partnerships of charities, designers and young people to make them into digital products.

Four of the projects were content based and three were apps. The content based projects focused on how to provide information in useful ways that fit naturally into young people’s lives. The apps faced additional functional and technical challenges. Each project explored different ways of working with users to create a digital product that suited their needs.

The lessons learned from these different ways of working and the methods suggested in this guide are not unique to working with this user group. These methods are rooted in an user centred design philosophy geared towards developing products based on user needs and are applicable to designing a product or service for any group of people.
THE PROJECTS

Doc Ready
Helps young people feel more confident and get better results when they see their GP about a mental health issue. Launched by Futuregov.

Find Get Give
Support for young people to find mental health support in their area and give feedback on it. Launched by Right Here Brighton & Hove.

Madly in Love
Relationship and mental health advice for young people and their partners. Launched by Youthnet.

Moodbug
A tool for sharing how you feel with your close friends and letting them know when you're thinking about them. Launched by Mind Apples.

Well Informed
The place to go to for the children and young people's workforce to get instant, accurate support on youth mental health. Launched by sixteen25.

Inhand
A digital friend that provides young people with tools, advice and activities when their mental health is at risk. Launched by FACT.

Headmeds
Accessible, straight talking information on young people's mental health medication. Launched by Young Minds.

You can read more about each project here.
Funding
Social
Tech
THE LABS GRANT PROGRAMME

Do you commission, provide funding or support others to deliver a digital project for social change? If so, this section is for you.

The Innovation Labs adopted a ‘lab based’ approach to generating and selecting ideas followed by a traditional ‘application and interview’ approach to grant funding.

- In early 2011 the funders formed a partnership to explore the use of Innovation Lab workshops to generate ideas for new forms of digital support for young people with mental health problems.

- Working with young people and other stakeholders the funders initiated a consultation process on how best to deliver an innovation programme followed by a tender process to deliver it. In October 2011 the tender was awarded to the Cernis Partnership to run two Labs and an incubation period.

- The first Lab took place on 10th December 2011, followed by an online incubation process until Lab 2 on 18th February 2012.

- Between February – May 2012 the Labs funders select eight ideas to base a grant programme on. Five of the ideas had been developed at Lab 2 while the other three were selected from the remainder.

- A team of funders and young people who had participated in the Labs was then established to manage the programme. At the same time functional specifications were commissioned for each of the eight ideas.

- In July 2013 the grants programme opened for applications, attracting over 32 expressions of interest. 50% of these were asked to submit full business plans and attend interviews.
In February 2013, grants were awarded to seven organisations to deliver seven of the products, one idea was removed from the programme.

The seven funded organisations began work in April 2013, completing their work between September 2013 - July 2014.

WHAT WE WOULD HAVE DONE DIFFERENTLY?

Many organisations in the third sector are unfamiliar with the process, the language and the resources required to do social technology. This included 6 of the 7 organisations funded by the Labs. They were able to design websites and engage with their users, but were challenged by the need to engage in agile development processes with their users and to design products which moved beyond simple content management.

We believe a less traditional model of grant funding would have enabled better development, delivery and management of the digital products. Based on this learning we would recommend the following:

Short funding duration

An arbitrary fifteen month period was set for delivery of the products. Most of them would have benefitted from delivering in a much shorter timescale with the concomitant velocity and impetus that comes from a group of people working intensely together.

Most of the projects had teams that were working on other projects or had other commitments not uncommon in the third sector where people juggle many projects. This made working fulltime on this project difficult. If people have to leave a project task to do other things or work only one day a week on a project, then their focus gets disrupted and workflow becomes inefficient.

On reflection we would have specified timescales based on full time labour and provided contract guidance to enable teams to generate greater velocity.

Funding payments based on gateways

The project teams were paid quarterly, but the only major contractual obligation was to release a product within 15 months. There were no
progress gateways for them to check through. This was a mistake as most projects didn’t have a clear design and development approach and the delivery date was too far in the future to effectively plan for. Having a clear set of gateways would have helped planning and improved velocity.

Gateways could have been mapped to the following broad product development and launch cycle:

2. Iteration of paper prototypes or other assumption testing experiments.
3. Delivery of an initial business plan or business model canvas.
4. Creation of user stories or a functional specification.
5. Adoption plan for building fan base across customer segments.
6. Delivery of digital prototype for private testing.
7. Delivery of beta application for public testing.
8. Public launch of a minimum viable product.
9. Iteration of product based on customer feedback.
10. Delivery of marketing deliverables across an agreed period.

Stages 9–10 are important because the launch of a product is not the end of a project, but merely the start of its most important phase—product usage.

**Clear Sustainability Goals**

One of the goals of the Labs was that the products built would become sustainable. The meaning of this was never fully defined by the funders but they hoped rather than expected that the products would go on to have a value that could be used to generate product-sustaining income through funding, sponsorship, advertising or even customer fees.

While it is still too early to judge each product’s sustainability prospects, during the build phase a lack of commercial know how among the
project teams hindered their ability to explore revenue generation models. It wasn’t something many had experience of so they focused on delivering the project as a product, hoping it could be sustained through maintenance grants.

Sustainability effectively meant more grant funding.

Sustainability is also a thorny issue for the third sector as there is often an ethical desire to ensure services are free at point of use. Many teams were reticent to even think about revenue models that involved a cost at the point of use.

We would suggest being clear in your expectations of sustainability and the support you can offer to achieve this. If you are you aiming to challenge existing ways of doing things and even disrupt the market then consider how you can help projects. This could include providing business advice and introductions to people in the technology sector who have successfully taken a product to market.

**Tailored funding levels**

Each of the Labs projects received approximately £60,000 in funding and resources to deliver their product. Costs of producing social technology can vary wildly depending on scale and ambition but as a guide in 2014 it can cost anywhere between £5,000 - £25,000 to prototype and produce a “minimum viable product” like a web or mobile app.

Following an MVP launch delivery of a full web service or mobile application can cost upward of £100,000 and even as much as £250,000. The point here is that social technology is rarely something that can be undertaken cheaply and where successful products are produced cheaply they are often created by skilled developers and designers bootstrapping an idea. Such UK successes, like Last.fm and Lanyrd often serve to give the impression that social technology is simple, provided you have the right idea. Quite the opposite. The difficulty lies in the execution of the idea.

Rather than provide a flat grant to all the different proposals in the Lab, each should have received an amount appropriate to its type and ambition. Content projects, of which there were four, were far cheaper to produce as they could use content management systems or platforms such as Wordpress or Drupal or even social platforms like Facebook or Twitter where their audience may already live! Content projects fulfill a need to inform and need to work hard to be current and relevant and
Use an application process that tests viability

The process of defining functional specifications for applicants and requiring them to submit a detailed business plan was detrimental to the project delivery teams. It required them to develop products based upon untested assumptions about the need, approach and future user.

Many tech startup programmes use a widely praised process from Stanford University that asks about Needs, Approach, Benefits and Public Value (including Competition). This model is echoed by the Nominet Trust.¹ These types of application questions help assess the viability of an applicant and a project, with the recognition that it is impossible to know a lot of detail about a needs or best means of execution before you fully explore the assumptions behind it.

Further details about assessing capability are given below.

¹ http://www.nominettrust.org.uk/knowledge-centre/blogwhat-we-look-application
**TENDER AND PITCH / PROPOSAL PROCESS**

The most common process, requiring a clear brief to work to.

Competitive bidding or tendering usually considers the following:

- Documentation of how to apply and evaluation criteria.
- Specification of requirement or area of focus.
- Any service level or grant making agreement required.
- Commercial, operational, corporate social responsibility.
- Pricing / cost schedule and deliverables (these may also be agreed post award).

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<tr>
<th>Description</th>
<th>Best used when...</th>
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<td>Familiar and processes to manage such projects already established.</td>
<td>You have a clear brief or idea and a set of discrete goals you want to achieve.</td>
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**Pro**

Can be restrictive, not allowing the best solutions to be provided. One way around this is to have a process of idea generation with interested parties as a prior stage in the process (see BBC Connected Studio).
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<th>Description</th>
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| A programme aimed at creating start-up businesses from early stage ideas. Typically last from 3-6 months and require full time commitment. A pitch to find the most suitable ideas and teams is followed by a process to create a business model, test revenue streams and build and design the product or service from alpha to beta and into market. Costs to run an accelerator programme would likely exceed £1m.  

*Example: The most famous example is Y Combinator. See also Bethnal Green Ventures for a UK example.* | Wish to diversify into new areas (you may take equity for the initial investment) |

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<thead>
<tr>
<th>Pro</th>
<th>Con</th>
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<td>A proven method for fast-tracking ideas into start-ups. Partnerships and networks (from technical and design advice to business and finance expertise) can be hugely beneficial.</td>
<td>Expensive and involving to set up and run, requiring experienced management. Usually used as part of a local economic development programme.</td>
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### HOT HOUSE

**Description**

Usually a 3-5 day residential with workshops / labs around specific methods (e.g. user centred design) and pitches to experts. Up to 10 teams of 2-3 people typically take part. The process usually gets to wireframing and storying ideas to create plausible products or services to fund.

*Example: BBC Innovation Labs (now defunct) but see the BBC Connected Studio for an example of how to run a series of day long events as part of a hot house process.*

**Best used when...**

Getting suppliers better able to deliver to a brief or a tender, or work up early stage ideas.

**Pro**

- Increases the chance of delivery and of getting something that achieves buy-in.

**Con**

- Cost of venue, payment to attendees and facilitators can be expensive, but making sure there is a clear commissioning model from the workshop/lab can also take time and buy in.

### HACK DAY & STARTUP WEEKENDS

**Description**

A day(s) set aside in a suitable environment for individuals or small teams to work on developing an idea to prototype or proof of concept stage. Successful usually Hack Days involve the release of data or development kits to work on and provision of food, drink and entertainment for participants.

*Example: NHS Hack Day*

**Best used when...**

- To find an interested audience of people capable of creating technology products. To flush out ideas and get people excited about what could be achieved with the data / resources available.

**Pro**

- Can galvanise interest in technology products and services and get the business engaging in the wider community. When done well can also form part of a more general community relations exercise.

  *Re-wired State have some good advice on how to run a Hack Day.*

**Con**

- Needs an experienced outreach worker and people networked into the various communities of developers and designers.

  *Expectations: Hack Days should not be seen as ways to develop a specific product, more a way to engage a wider audience and gain some ideas about what could be done.*
WHAT YOU CAN DO

With the experience of the Labs in mind here's our recommendations for how you can prepare yourself for funding more social tech projects. Alongside this advice we'd strongly recommend familiarising yourself with Nominet Trust's Triple Helix of Social Tech Innovation. It explains the importance of building three types of value into social tech ventures – user, social and financial.

Without each of these a social tech product is unlikely to be successful. The Trust’s overview and practical application documents are drawn from five years’ experience of funding a broad range of social tech ventures, while their guide to social impact measurement provides in depth guidance to what to measure at different project stages.

GET TO KNOW TECH DEVELOPMENT PROCESSES

As a funder it’s good to know what development approach your projects will take so you can structure gateways around it. Social tech development processes tend to follow one of two main methodologies, both of which you can create frameworks around.

Waterfall

Waterfall is a traditional development approach where the product or service is defined in detail up front, usually before anything is built. Research is completed and features and functionality are defined and described first. Once the build phase is completed functional testing is carried out and the product is launched.

The major risk with this approach is that what you initially define remains untested and the assumptions made behind these definitions can prove faulty. For example, Find Get Give’s initial specification required that organisations listed on the site needed to be moderated and administered. After building this functionality the FGG team
found that this was a very inefficient way to get them listed and that a self-moderating function would have been more usable and less labour intensive. Testing this key assumption through paper prototyping with people from the target organisations would have led to a better design decision before building started.

**Agile**

Agile is a very different approach. Here the early focus is on using research, simple experiments and prototyping to develop user ‘stories’ of the features and functionality needed for the product to solve the core identified problem. Stories are prioritised and the development team work to deliver on the most important ones first in the simplest way possible, including paper versions. Each version is then tested before a new one is built.

Here, the risk of not delivering what your audience wants is reduced and replaced by uncertainty about what you will eventually produce. This end product could end up different from what the client, funder or provider anticipated. However, this isn’t necessarily a bad thing and many people argue that this process leads to the execution of ideas in ways that work better for users. Doc Ready, one of the Innovation Labs projects was built using agile processes such as paper prototyping, which helped shape the product as a single minded proposition that eschewed unnecessary features and functionality to do one thing well – preparing young people for their first visit to a doctor.

Nominet Trust have created an excellent [Agile Development Guide](#).

**Being Pragmatic**

Most digital developers will use a “mixed methods” approach, with aspects of both waterfall and agile. We wouldn’t advise you prescribe one approach over another but know the pros and cons of both and work with your tech developers to identify an approach best suited to the problem your project is trying to solve.

**LEARN ABOUT DEVELOPMENT CYCLES**

The apps and web services you use every day regularly need their code base improving, bugs and issues resolving and new features adding as customer needs shift.
All projects should have a clear cycle that researches, tests and builds (and fixes bugs and identifies issues to future scaling) and continues through another cycle of the same. They cycle does not end with product launch, it merely continues with added emphasis to research how the product is being used in the real world.

Social tech products are the same. They require post launch development and ongoing support. However, this need is often overlooked by both funders and third sector organisations.

The diagram below provides a simplified view of a product life cycle. One of the ways you can support the organisations you fund is by using appropriate payment gateways linked to stages in the lifecycle of the project.

**Diagram: A simplified product life cycle**

- **Design research to understand needs and behaviours**
- **Stories and principles (or features and functions) to meet user needs**
- **Alpha product (this could be paper prototypes)**
- **Beta development with open of closed testing**
- **Testing stories (or features or function)**
- **Continuing to develop a core service, be that an app or web service and getting feedback**
- **Deciding what the product is – a single minded proposition –and where it lives.**
- **Talk about your project, build interest in the idea, find your nascent community**
- **Creating a minimal viable product may be the most effective approach to get to market.**
Most of the Labs projects worked on the basis that project completion equated to the product launch date, with minimal resources allocated to maintaining the product and driving adoption. However, as already mentioned, this is the point at which the project heavily needs resources. It has come into the world and needs to listen to customer feedback, develop to show it is listening and promote itself to new users through marketing and other adoption work. This was a hard lesson for most projects.

ASSESS APPLICANT TECHNICAL CAPABILITIES

Of all the issues encountered by the Labs funders and projects the most significant one was understanding the way technology products are crafted. The practice of how you go about making something. This restricted the funders’ ability to assess each organisation’s capability and the effectiveness of their proposed approach.

Here are some things to check when assessing capability:

1. **Look at the track record.** Has the applying organisation delivered technology products before and if so, how? Most of the Innovation Labs teams’ lead partners were charities without a core competency in technology. We would recommend that the lead partner has a proven track record in delivering technology products that goes beyond simple content websites.

   Has their technical partner experience in delivering products with a social mission? We would recommend that the design and development aspect of the project be delivered by an agency with a track record in social tech products.

   Look at the social media profiles of some of the people you’ll be working with to see if their blog, Twitter or LinkedIn profile provides a sense of their knowledge and track record in running digital projects.

2. **Ask the technical provider to describe how they work.** Most web developers will have a product development process. A good process will be one that helps make robust decisions and takes into consideration the following:
a. Research into people’s needs and behaviours. User centred design is a term used by many people to describe a heterogeneous range of methods to understand and design for an audience. Make sure these methods are described.

b. The most appropriate form for the product or service. There are a range of different platforms and technologies so how do they decide which is most appropriate? Is it just the easiest or the one they know most about, rather than the most appropriate? For example do they expect it to be an Android app or a HTML5 mobile optimised service? A feature rich product, or something that seeks to deliver in the simplest way possible?

c. Approach. What development methodology do they use? Is it agile or waterfall, or something in between? Who is involved and when?

PROVIDE MENTORING

Each project team had a lot of delivery autonomy. This wasn’t necessarily a bad thing, however the lack of formalisation of what was expected and when, meant some of the teams struggled to work out the best way to deliver their products or services. They wanted to be seen to be doing the right thing but were reluctant to talk about problems, issues or things that weren’t working, even though there was valuable learning to be gained.

To manage this issue the funders introduced a mentor to each team. For those teams who lacked development skills and a track record of doing social tech this role was quite hands on, helping them design a project approach and liaising with funders to bring in additional skills where required.

The role of a mentor is like that of a critical friend, someone with authority from experience rather than status. A mentor has the success of the overall project as his main goal and should align themselves with both funders and teams and act as a go-between where required. In the case of the Labs mentoring support was only introduced after the teams began work. It would have been beneficial had the role been agreed during the grant making stage.

On average each team required 45 hours of mentoring contact including group workshops, individual consultations and phone
Learning and evaluation is a core part of third sector working. However, much learning and evaluation is passive, in that it documents a project but rarely engages critically with it to effect real time change (even action research insight cycles can take months). But what’s the use of learning if it only happens at the end of a project and comes in the

support. The bulk of the work focussed on helping them create an approach to their work. This meant initiating the following in several of the projects:

- User-centred design process to encourage teams to research their audiences and generate design leading insights.

- Learning around lean ways of working, to encourage early stage testing of ideas and assumptions.

- Learning around roles and experience required to develop software applications for those teams with little knowledge so they could hold informed discussions and make informed decisions with their tech partners.

The teams found mentoring helpful and that it led to better decision making. However the effort required to implement some of the advised processes and the demands this placed on the teams, along with criticism of some of their approaches, was perceived less favourably. It is important that a mentor understands the social tech context and that teams are willing to negotiate and work with a critical friend.

**Mentoring: skills and experience helpful for a critical friend**

- Have produced social tech (preferably with both failures and proven successes).

- Understand development, from research to design, development and marketing

- Be well networked

- Be able to engage with a variety of stakeholders, from chief executives to junior researchers

**MAKE LEARNING ACTIONABLE, NOW**

Learning and evaluation is a core part of third sector working. However, much learning and evaluation is passive, in that it documents a project but rarely engages critically with it to effect real time change (even action research insight cycles can take months). But what’s the use of learning if it only happens at the end of a project and comes in the
form of a large, dry report that tells you – with hindsight – what you already knew or suspected?

Evaluation reports may be an organisational necessity (e.g. to show how well money has been spent) but in tech projects this should be done in a way that allows real time, productive learning that can be rapidly applied and actioned while a product is being developed.

Each Labs project was required to complete a quarterly monitoring report that detailed not only progress around certain KPIs but also financial spend. These reports were helpful but because they were every 3 months they were rarely useful in providing actionable information. Having a mentor to liaise with the projects meant that issues arising could be understood and dealt with far more rapidly. For example, some of the teams lacked a defined approach to delivering the work. This issue would not have come to light through monitoring reports alone as it wasn’t something that was easily articulated as an issue. As a response to it the mentor was able to support each team to implement an user centred design process and start work on understanding and designing for customers needs.
Do you work in the third sector and want to bid for funding to deliver a digital project? Or perhaps you have just been awarded funding. If so, this section is for you.

**BEFORE YOU BEGIN...**

In the world of digital its easy to have an idea. The same applies to social tech. Generating ideas for how to help people isn’t difficult – the Labs generated 189 in one day. The hard part is deciding which ones should be built and making the right decisions about how to develop and implement them.

From the moment you get awarded funding you will be faced with these decisions. So we’d recommend some background reading and understanding a few principles before you start shaping your bid. This will improve the quality of your proposal and make it easier for you to deliver on it.

**1. UNDERSTAND THE PRINCIPLES**

Many of the Labs projects adopted the same principles used to deliver human powered services to build their product with. While not-for-profit principles are very worthwhile the projects could have also adopted some of the guiding principles that are currently driving commercial product development within the digital startup sector.

These principles are focused on challenging founder’s ideas of what they think people want and then helping them to make highly informed decisions on what they should be building instead. They are based on The Lean Startup, a development approach popularised by Eric Ries. Lean principles have gained currency in the technology sector and can be very helpful for new social tech projects because their behaviour usually replicates those of a startup.
Here’s an introduction to applying Lean principles in a social tech context:

**Work to Eliminate Uncertainty**

Building new products is an extremely uncertain process. But there are tools and methods that will test your vision and reduce uncertainty. Put a structured methodology in place around the development of your product.

**Always ask “Should this be built”**

Create rudimentary experiments and simple versions of your product to answer the questions “should this be built” and “is this the right solution to the problem”.

**Focus on Validated Learning**

Every experiment or prototype generates learning, and every piece of learning that has been validated by your users is a measure of your progress. Measure your progress in learning, not product iterations.

**Use the Build, Measure, Learn Feedback Loop**

Join the above principles together into a feedback cycle that involves turning ideas into experiments or products, measuring user responses, and learning whether to ‘pivot or persevere’. Atune all your processes with this activity cycle and accelerate as much as possible.

**Fail fast**

At time of writing the fail fast principle has become a bit of a cliche. However, at its heart is a principle that emphasises the value of failing to validate your assumption about what your users need and will use. Achieve this failure as rapidly and as often as possible for as little effort as possible. You’re then more likely to end up with a validated and successful product.

“It starts by not accepting the project’s premises…...by challenging the underlying assumptions, our heritage, our current solutions and mindsets, and even the current tools and professions involved in tackling the problem…Allowing time, focus, and collaborative effort to address the underlying assumptions is different from the way most projects are implemented.”

*Christopher Bason on challenging assumptions*
2. GET FUNDED

Applying for funding to build a social tech product shares many similarities with applying to deliver human powered services. You need to show a clear need or problem, that you have an approach that’s likely to succeed and that your organisation is competent to deliver it.

However, there are also differences. Unless you’ve already run a ‘discovery phase’ or prototyped your idea then you won’t be able to describe your idea’s features or functions in any reliable detail. Instead you’ll be looking to show that you have a clear and strong design and development process with a technical partner who has specific and relevant skill and experience to work with you. You’ll also be looking to show that you have strong networks in place to gain plenty of user insight, build a following and drive adoption.

Approaching Funders

At the moment it’s likely you’ll be making one of two kinds of funder applications:

1. To a digital funding programme (e.g. like those run by Nominet Trust or Wayra)

2. To a traditional funding programme for a digital project (e.g. Big Lottery, Esmee Fairbairn, Comic Relief etc.)

If it’s a digital programme it will likely specify what its funders want you to talk about. However, if it’s a traditional programme then your proposal is likely to sit outside of their normal experience so you’ll need to consider more carefully how you present it to them. If they are inexperienced in funding digital then they may perceive higher risks in doing so. Consider why they should take a risk on you.
Your Proposal

Before you begin phone and ask potential funders how they assess applications for digital projects. Try and have a conversation that helps you understand their level of experience, typical approach and current thinking. Ask lots of questions and listen carefully. If you decide to apply then your proposal will need to consider the following:

1. **What evidence of need do you have? What makes it genuine?**
   In the face of your attempts to solve it, why does the problem persist? What do people say about the problem and what conclusions have you come to?

2. **What evidence have you got that your idea could work? Is there a human powered equivalent?** Have you tested or paper prototyped any ideas yet? What have others done that could be replicated? Asking people what they think of your idea is a notoriously unreliable measure. Evidence based on your own tests or the success of others is much more robust.

3. **How will you uncover and test your assumptions?** Unless you have already started this work then the details of your proposed solution can only be uncertain. Recognising this and showing funders that you have a process in place to validate your assumptions and achieve proof of the viability of your core concept will help them feel confident that you have clear, strong ideas but haven't made premature decisions about how your product should function.

4. **Why are you the right organisation to deliver this project?** What is your experience of working in digital and what have you learnt from past failures and success? Why is your technical partner the right one to work on the project? What skills and experience do they have that shows they can be relied upon to deliver?

5. **Do you have a flexible structure that could evolve with the product?** How will you integrate user, design, management and development roles to ensure a tight process that empowers decision making by those closest to the core of the project? Many of the Labs projects were managed on a very part time basis which harmed focus and efficiency. How will your team be structured to support periods of intense working and generate development velocity?
Whether or not your funder requires it you will also benefit at this point from creating a shorter written pitch that summarises your proposal and why you should be funded.

Doing this before you write your bid will help crystalise your thinking and provide a reference point for iterating your ideas as you work through the bid.

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### PROJECT INITIATION

Once you’ve got funding in place we’d suggest getting these three things done before you spend any money.

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1. **CHOOSE A TECHNICAL PARTNER**

As a third sector organisation you’ll likely need a technical partner. There are very different technical specialisms so how do you know what partner specialisms will be a good fit for your project?

Six of the 7 Labs projects were delivered by a team that included a technical partner chosen by the third sector organisation. In most cases the technical partner was chosen because there was an existing relationship.

Your existing technical partner may or may not be right for your project. If their core competency is in front end development of content websites (many creative agencies fit this category) their knowledge of developing web services or mobile applications is likely to be limited. If you’re building an app then it matters that you choose a partner who has relevant experience of developing to a platform like Android, iOS or web.
One of the teams in the Innovation Labs chose a partner whose main focus was producing content rich websites. As a result the project’s solution became focused around the partner’s technical capabilities rather than the best way to execute the idea and get it ‘to market’. Another team was led by the initial research work to focus on delivering a mobile application but held off employing a technical partner until they had thoroughly scoped the market to find the best fit for the app’s requirements. Having this time enabled them to create an iOS application that was best-of-breed.

Read more...

Mark from Doc Ready describes what makes a good team.

2. UNDERSTAND WHAT DEVELOPERS AND SOFTWARE ENGINEERS DO

Writing code is a craft. Speak to any developer and they will have a preferred coding language. They will also have a preferred way of working - agile, waterfall or some hybrid. They will use different tech ‘stacks’ - the different platforms and services needed to actually get what they are building to work.

Most websites and services are simple content sites that don’t require much technology and code. They often use off the shelf CMS (content management systems) like Wordpress. Apps and other products that deal with data and use it to power actions require more sophisticated technology and platforms (e.g. Doc Ready uses data submitted by young users to create a tailored output for each person).

If you are working with a technical partner or have in house technical resources it is important you understand what they do so you can be involved in technical decision making and understand the technical implications of non-technical decisions. This will involve you learning some of your tech partner’s language so it becomes common language to you (likewise they'll need to learn some of your users’ and sector’s language).

Doc Ready was able to deliver a successful prototype long before the other Labs projects in large part due to the team having a common language and understanding of what each other was doing. Other projects who were new to working with technical teams found the
most difficult problem was a lack of understanding - they couldn’t discuss the project effectively because there wasn’t a common language. Knowing how things work, even on an elementary level, enables you to talk and work together as a bigger team to make the necessary decisions.

**Make things visual as a way to interrogate them**

Ask the different people in the team to describe what they do and a project they have worked on. Draw out the examples and make them visual – e.g. the “tech stack” of components required to get a website or application to work is best understood when drawn as a system diagram. The same is true of a marketing campaign or research fieldwork - you’ll find technical partners equally interested in the nuts and bolts of a campaign if you visualise it and break it down into component parts.

### 3. CHOOSE A DEVELOPMENT METHODOLOGY

There are a number of development methodologies that are helpful to understand. If you learn how they work you’ll be able to get more involved in making design and technical decisions. And if you’re more involved then decisions will become more informed and the end result is more likely to reflect your users’ needs.

**Agile**

You have probably heard people talking about working in an “agile” way. For some it’s a broad approach to ways of working and for others its a methodology with tightly defined manifestos and practices.

The key facets:

- You specify a budget and/or a time within which the work needs to be completed but the application or software is not usually specified in detail.

- You learn as you develop - this includes testing as you go with a group of potential product users.

- You work to customer and business needs and prioritise those rather than features or functionality.
• The business or organisational goals and values are closely enmeshed with the aims and goals of the software.

• Working software is the primary measure of progress; so you see things developing regularly.

**Waterfall**

Waterfall methods by contrast look to specify as much as possible up front. You’ll probably be more familiar with this approach; working to a brief where you assume the features and functionality needed to meet the needs of your users and then specify and cost them up in advance.

The term waterfall refers to gateways through which the project typically progresses along the route you have specified. These gateways are often checkpoints for budget and time and functionality.

The key facets:

• Aim to specify as much as possible up front to describe what you ‘get’.

• The roles and deliverables are produced from the functional specification.

• Testing and checks are placed within a delivery framework with sign off at each stage.

**Read more...**

For a great review of agile versus waterfall methods see Dan Robinson’s article and guide for the Nominet Trust.
<table>
<thead>
<tr>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>The product should be closer to user needs and wants.</td>
<td>You have to be willing to trust the process (this isn’t really a disadvantage unless you demand control!)</td>
</tr>
<tr>
<td>You learn as you go and adapt accordingly—there’s less risk of lengthy sign off process.</td>
<td>It takes time to be part of the process. This is not something you can opt out of. It’s hands on.</td>
</tr>
<tr>
<td>It improves communication - so there’s less risk of a “that’s not what I asked for!” scenario.</td>
<td>You may not get what you expected when you set out. Again, this is not really a disadvantage, but may be hard to explain to senior management (hence good communication is required).</td>
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<table>
<thead>
<tr>
<th>AGILE</th>
<th>WATERFALL</th>
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<tr>
<td>You know what you will get and when (or you should do!)</td>
<td>What is delivered may not be appropriate as the assumptions made at the start may be faulty.</td>
</tr>
<tr>
<td>Managing things like marketing and PR and other integration work can be planned in around the delivery schedule.</td>
<td>There’s greater risk of miscommunication as teams work in silos and management often assume a “hands off” role.</td>
</tr>
<tr>
<td>Its a classic project management process</td>
<td>It can be unwieldy and require significant project management resource.</td>
</tr>
</tbody>
</table>
DESIGNING

These three points will help you design a product that solves the right problem for the right people in a way that they can engage with.

1. START WITH CUSTOMER RESEARCH

What needs does your product or service address? What ‘migraine’ does it cure? You may know a great deal about your intended user market but the more you can understand how your idea fits into their lives, the better your chance of succeeding. Annabelle Davis writes about her experience of customer research with Innovation Labs.

Design research, also known as customer development is an explicit process you should always carry out before developing your idea any further. You may have already done some of this work in an implicit way but it is important that you adopt a more formalised approach, thinking critically and considering the problem from different points of view. This process need not be time consuming or expensive. There are various approaches to generating insight which are very effective.

Methods for identifying your audience

It’s typical for people to say that their idea is aimed at ‘types’ of people: “younger people”, “disadvantaged people” etc., however this tells you nothing about who they are. These definitions are too broad to be helpful in designing the shape of your idea. How can you be more specific?

Backcasting is a where you take (borrow!) the possessions of some real life target customers and ask people in your design team to describe that person. The possessions usually consist of between 6-10 objects (they should be anonymous i.e. not a driving license!). It’s a great method for uncovering bias, testing assumptions and generally getting people to be more critical about the way they think about others.
Personas are quite a conventional tool, whereby you describe potential customers according to their characteristics and behaviours, adding in as much detail about interests, skills, personality, dreams and environment as you can. Personas should be seen as examples to discuss and debate rather than as static, illustrated images. They are mood boards for describing people - and people can be complex, messy and unpredictable. We’ve written about the value of personas to charities.

Experiment Board is a tool that evolved out of the lean startup movement. It provides a robust structure and methodology to test hypotheses about the problem you’re trying to solve and who you’re trying to solve it for. It’s useful because it helps you focus on your assumptions and find practical ways to test them.

See Javelin’s version of the Experiment Board.

Methods for understanding user behaviour and decision making

Shadowing. Ask permission to follow someone involved in the lives of the people you are designing for. This could be a youth worker. You’ll obviously need to consider the legal and ethical implications of doing this work, ensuring satisfactory DBS checks and being open about your role with the people you are observing.

Asking ‘why’. Continue to ask why until you get a more concrete understanding of motivations and behaviours.

Visual documentaries. Document the things, materials, people, spaces and times when the behaviours and decisions you are interested in happen. Piece the images together as a map will help you to locate the idea in its fullest context.

Empathy Maps are evolved personas that get your team talking in a more user centred way and viewing a product, service or issue from the perspective of your stakeholders. They focus on uncovering the sensory information and experience of your users i.e. what your persona sees, thinks, feels, hears, gains, and is challenged by.

Use research and co-creation to inform design, not dictate it

Working to deliver solutions with users has been a prominent design philosophy for at least twenty years. It can be highly effective when done well, but is often embraced uncritically.
'Co-creation’ is a term that encompasses many things and many different ways of ‘doing with users’. The mistake many organisations make is to allow the audience to participate in the design of the solution rather than help inform it. Much like a good recipe, you need a chef to create a dish from the relevant ingredients. Knowing what ingredients the audience want and how those different ingredients will work together is a skill.

This is crucial.

Interpreting audience needs and wants is best done by someone with a relevant background in design research and should be carried out only as part of the design process. A number of Labs projects failed to follow this process and ended up with a proposal that was like a Christmas wish list, an unworkable mish-mash of ideas and opinions generated by users. If it were a recipe it would have been inedible.

Rather than insisting on co-creation look at why you (or the funder) are wanting to use it. Good use of human centred design practices (as well as good agile processes), described above, include people in your process in ways that should satisfy any funder.

Read more...

IDEO’s Human Centred Design Field Guide, full of expert advice and methods for conducting design fieldwork.

Dan Lockton’s Design With Intent Cards, a useful tool kit for group work and to think about how to influence behaviour through design.

Mental Notes, an excellent toolkit showcasing the various ways you can influence how people interact and behave.

2. THE VALUE OF STORYBOARDS AND CUSTOMER JOURNEYS

A customer journey is a tool that communicates how a user would experience a product or service and how the proposed design will help them accomplish their goals. They are also known as storyboards, and are commonly used in the movie industry.
Customer journeys document how someone finds your product and, frame-by-frame, describes their interaction with it by showing their key experience touchpoints, including their emotional responses. They are incredibly helpful for both designing and marketing a product or service.

Customer journeys are especially useful for:

- Identifying key touchpoints with your product or service and exploring how user experience could be improved.

- Sharing concepts and helping team members and other stakeholders understand design ideas and decisions.

- Understanding how your product might fit into an user's lifestyle and the best opportunities for them to find it.

Try creating customer journeys for each of the customer segments you see using your product or service. Your customer journey should aim to support different types of experience, from more immersive experiences for people who love what you do or are interested in frequent and regular use, to more transient visitors who may be converted by different types of interaction. Your proposition needs to be clear for everyone, but their experience of that offer or proposition can differ.

How to Create Customer Segments

If you’ve done your discovery phase and worked on personas and behaviour types, you will probably realise now that your potential audience covers a wide spectrum of types. These can be helpful to segment and build journeys according to the following attributes:

**Attitude**
Can be useful in describing a person’s outlook and set of values or beliefs.

**Behaviour**
The best way to understand if someone is likely to do something is to see if they have done it before. If you’re building an app to manage mood and mental well being then documenting over time how people use existing apps and mood products would be invaluable.

**Attention and space**
Segmenting audiences according to their potential attention span and the medium they use can be incredibly valuable. How much attention
3. PROTOTYPING

Prototyping is one of the key features of an agile approach to product development. It gets teams thinking in a more informed way and making better decisions. Doc Ready made six paper prototypes as part of their commitment to showing people ‘real things, really quickly’ and as a means to “making a mental health service that people actually like”.

Prototyping typically involves creating a paper or digital mockup of an idea and then observing users’ interaction with it. We think its good because rather than relying on what people say it tests their actual behaviour. Its engaging, inclusive and generates specific feedback and tangible, informed insight. To achieve a similar volume of data or quality of learning via traditional methods (e.g. focus groups or user consultation) would likely take several weeks.

Paper prototyping involves use of card, sharpies, blutack and tape to create a paper mockup that can be operated by a human controller in response to users’ interaction. People are often stunned by its fun, simplicity and effectiveness. Paper is tangible and tactile so it provides an experience that is similar to using a product on a phone or computer. Having a human operator gives it personality and someone to answer questions when users get stuck. This process of questioning, both ways, provides rich and valuable insights into their experience of the prototype product.

Paper prototyping is inherently inclusive and elevates the status of the tester role. When something doesn’t work as expected its the...
prototype’s fault, not theirs. This levels the playing field between designer and user. It removes barriers and breaks through any lingering sense of ‘us and them’. It brings people intimately into the design process as an integral part rather than an extension. In real time they get to see their experience and suggestions being and integrated into the design.

Because paper prototyping engages people dynamically and brings them into the heart of the process it gives an authentic experience. This experience is real enough to mean that by observing and asking them the right questions you can learn a lot about what, how and why they would interact with a digital version of the paper product. This kind of learning is like gold dust. It’s valuable for three reasons:

1. It helps understand users underlying wants and needs in a way that talking to them never will. Understanding these deeper rooted needs makes it easier to create specific features and solutions to meet them. Your product becomes more indispensable to them.

2. It builds two-way empathy between designer and user, something that helps every aspect of design and development. This is useful for testing digital prototypes with the same group.

3. It enables you to zero in on any design elements or features you are struggling to understand or implement. e.g.

   “We’re not sure exactly what will happen when you press this email button. Oh, you’d want to be able to send it to yourself?

   Why’s that?

   Oh, it’s because you think you’d want time to reflect on what you’ve said before being sure you want to send it on to your worker.”

Read more

Prototype Testing Plan
The Magic of Paper Prototyping
Rough Prototyping
POP Prototyping App
PLANNING FOR UNCERTAINTY

From the start of your project we recommend carrying out these four actions. If you leave them until the end, or bolt them on later then at best you’ll be creating bigger problems for yourself and at worst paving the way to product failure. We’ve been there and done it badly ourselves.

1. MAINTAIN A ROADMAP

Knowing where you’re going is critical to your project’s success. You may not know exactly how you’re going to get there, or what you’ll face along the way, but mapping out what you do and don’t know right now will help you stay on track.

Doing this will also galvanise your team and help you manage resources and tasks effectively, regardless of what development approach you take. Think of your roadmap as a strategic communication document. Its purpose is to show your team and other stakeholders your product vision and the high-level initiatives needed to get there.

Techniques for building roadmaps are best focused on outcomes, not deliverables. Think what you want to achieve rather than what feature or functionality it will need. A roadmap that is free of delivery details and assumptions generally leads to better decision making. This makes it easier for team members to bring their specialisms together to inform each deliverable as the product develops rather than specifying it up front.

A roadmap is also a plan, not a commitment. Its not a Gantt chart and doesn’t fit well with traditional time-based project management tools. At the start of your project, and for several months after, it will be impossible to commit to timescales and deadlines with any degree
of certainty beyond a few months. So, if you can, leave out any dates beyond a month or two.

We’ve created a list of areas that your roadmap should cover. Its based loosely on Jamie Arnold’s account of how he builds roadmaps within the Government Digital Service.

1. **What are we trying to prove or learn?**
What is the migraine you are trying to cure via the product? Or, what are you trying to prove with the project?

2. **Who are the users?**
Do we have people to work with? Do we have personas for them?

3. **What are we operating?**
What is the product or service’s core concept? Has it been proven yet?

4. **What are we saying?**
What are you saying at each stage of the evolution of the project? Its crucial that from the day funding is agreed you have a story that brings the product to life and engages people.

5. **What are our assumptions?**
What assumptions have we made about how people behave, or how the product will evolve. How confident are we in these assumptions?

6. **What are the dependencies?**
Dependencies can be limitations or opportunities that are likely to influence how the project evolves. They include, budgetary constraints, skill strengths, potential partnerships, technical dependencies, and contractual deadlines. How critical is each dependency? If any are mission critical then think about alternative scenarios and approaches to mitigate risks.

7. **What capabilities do we need?**
Capabilities can be human or technology roles. They include research, design, comms, mentoring, information architecture, coding, governance, information security etc. Create a list and add an owner to each one. If you find you don’t have a capability you need then budget for it.

The key to the roadmap being useful, relevant and effective is to treat it as a living and breathing member of your team. You should be reviewing it at least monthly, identifying what has changed and why, and amending it. Doing this will, in the face of all your project’s uncertainty, help you
keep a sharp focus on what you do and don’t know and tighten your
team’s focus on the process at hand. From your roadmap you can plan
critical tasks, immediate deliverables and short term deadlines.

Read more...

Product roadmaps
Why you shouldn’t use a detailed roadmap

2. THINK ADOPTION BEFORE MARKETING

We tend to think of marketing as an additional, bolted on activity that
needs doing once a product or service is live and available to its users.
However, we’d encourage you to think in terms of ‘product adoption’
first, and marketing later.

Product adoption is about the product, the experience you create
around it and the relationships that people build with it – the
relationships they build as they become your fans. It’s about how
you nurture and communicate with your fans, and how you
cultivate stories and discussion about your product.

To build these relationships you need to understand the stages that
people go through when deciding whether to adopt your product
and how you can support them through the process.

Stories

One of the best stories you can tell is the dream of where you want to
go and what you want to do. Describing the journey of trying to achieve
those dreams can be interesting. People like other people who give things
a go, who try their best and who talk about their highs and lows in an
honest way. Just by sharing the story of your product’s journey you can
drive interest and adoption in your idea. Not in a hyped, exploitative
way but just through the power of telling your story.

Storytelling leads into a very powerful truism for our times, that
markets are conversations. Thanks to the emergence of the internet
and social media an attentive listener and storyteller with a good voice
can build a customer base just as large as an established organisation
can. If you’re a small and passionate team you can take advantage of
this before anyone’s even mentioned the word ‘marketing’.
Cultivating fans

Adoption amongst a small group of people may feel insignificant but with a little help these ‘early adopters’ can influence a wider group of people to trial what you’re doing. Some of those people will in turn recommend others. This isn’t about having a social media strategy with a plethora of social media accounts and product share buttons. Its about genuinely wanting to share your story in an authentic way and engaging with those members of your audience who believe most strongly in the concept of your product.

Share your stories in honest ways and treat your fans well, especially those early ones who take a risk on your product because they really believe in what you are doing. Talk to them through your blog, on social media, when you meet them at events and in every piece of communication and user experience you create.

Read more...

We've written extensively on product adoption in the third sector. Here’s the pick of Labs blogs:

- What is Product Adoption?
- How authentic blogging increases product adoption
- How to Build 1000 True Fans
- What to do with your first fans

3. START WITH A BUSINESS MODEL

Even though your project has a clear social mission, with non-commercial objectives, it still needs a business model. While this model may include revenue generation its more about planning how you’ll sustain your product—whether that’s through grants, revenue generation or internal resourcing. Its very difficult to know how you’ll do this early on so your first plan should be more of a strategic document that reflects the uncertainty of developing and launching a new product and provides a framework for exploring models.

Business modelling is not just about aligning all your activities around a long term vision of sustainability. Its also about aligning them in the best way possible to help your app be adopted. For both these reasons it’s important to start forming a business model right at the beginning of your project.
You don't need to have all the answers, and those you have are likely to change. But by documenting your ideas early on you reduce the risk of ending up with a product that does not have the features needed to be sustainable or an excessive reliance on administrative input to continue delivery.

**The Business Model Canvas**

The Business Model Canvas is an excellent strategic tool for exploring your business model. Like all good tools its usefulness lies in the process it guides you through, the conversations it creates and the thinking it stimulates.

The tool is a one-sided visual template of nine business building blocks that describe your product’s value proposition, infrastructure, customers, and finances. It will help you explore and understand your product’s bigger picture beyond its design and help you align your actions to support product growth and adoption. In our experience it can be applied to most sustainable business models.

The Canvas’ value is that it will help you find a business model that fits with your product’s concept and values and at the same time help you create your product in a way that enables a sustainable business model. As your product develops so will your learning about its early adopters and the setting into which you’ll be launching it. The insights this generates also need to be considered in relation to your business model. This could mean formally working through your Canvas again (you could be doing this every few weeks or couple of months) or constantly adjusting it with every new insight or opportunity. It doesn’t matter how you maintain your canvas so long as you’re actively considering each of its building blocks as you design, launch and grow your product.

**Read more...**

*Business Model Canvas Templates*
*Happy Startup Canvas*
*Alternative business plan template*
“Measuring(193,169),(735,216) in particular ... is often based on ethics and values rather than effectiveness. Due to heavy investment in projects through personal relationships it can be hard to be ‘objective’ and use SMART goals as you know you should.”

Helen, Madly in Love Project Manager, YouthNet

Third sector decision making is often driven by ethics and values rather than evidence. Given the importance of our values base this is in some ways understandable. However in tech projects values driven decisions tend to be weaker and lead to poorer end products. Data driven decisions are far stronger.

However, there are so many things you could be measuring that knowing what to measure and when throughout your product’s life cycle can be difficult to work out. Nominet Trust have produced an excellent guide to the different metrics to consider at each stage. Highly recommended.

Measuring during product development

All of the advice we’ve provided in this guide is geared towards setting your project up for crunchier and leaner decision making based on evidence. Examples of evidence include customer discovery findings, test results, prototype feedback, unsolicited problem descriptions, device usage statistics. Verbal reports of wants and solutions make for weak evidence while verbal reports of problems are strong. We strongly recommend reading the Lean Startup or attending a Lean Startup weekend workshop. Lean’s principles are heavily focused on finding the right thing to measure and the appropriate metric to use when designing and iterating your product.

Lean methods aren’t a panacea for every app or service design problem but they are a solid foundation that will quantum leap you beyond the world of focus groups and vanity metrics and into the world of measurable impact, validated learning and smarter decision making.

Measuring live products

If you ran a restaurant you wouldn’t check with the maître to see how many diners there were each month, you’d be checking by the hour and getting feedback on what was consumed. While you may only be changing the menu and prices occasionally those decisions would be
made from a deep understanding of regular user habits, gleaned on a regular basis.

**Measuring Impact**
One of the many things digital products and services are good at measuring is use. However, what they are often far less good at is in telling you what effect that use is having. If people are using a service you would expect them to be gaining some underlying utility – in this case an improvement in their wellbeing - but proving this is incredibly difficult without resorting to traditional research methods – questionnaires etc, which are only a very approximate tool.

**Measuring Use**
Many technology projects will cite visitors, sessions and ‘conversion rates’ as KPIs. These three variables provide a sense of engagement and popularity. However, these can easily become ‘vanity metrics’ as Dan Barker states in his excellent post conversion rates are often used uncritically and need to be considered with other variables as not all visitors will convert equally, higher visitor numbers and lower conversion levels may still be more beneficial and a more engaging site may convert less well (as people visit more often but don’t action what you want them to – they may just be coming to read your blog). Careful consideration of what metrics suit the project are needed and it’s worth while making sure each project really understands how to measure and analyse data – and if they don’t then to find someone who does.

**Tools**
Analytics tools for web and mobile applications ought to be built into the way your team works so they are always there to help you make on going development decisions. iOS and Android markets provide data on mobile applications and services like Flurry can generate more detailed data. For web based projects Google Analytics is an incredibly powerful tool for monitoring a range of metrics as well as testing different ideas and experiences during early design phases. Google has it’s own Analytics Academy which takes you through step-by-step videos of how to use it.

**Read more...**

Nominet Trust Guide to Lean Social Impact Measurement
The Lean Startup Book
Lean Startup Machine Weekends UK
FURTHER READING

An Extremely Short Summary of this Guide

Nominet Trust’s Triple Helix of Social Tech Innovation and Practical Applications here and here.

Nominet Trust’s Guide to Lean Social Impact Measurement

Government Digital Service’s Service Design Manual

Namahn and Design Flanders’ Service Design Toolkit

Nesta’s Development, Impact and You DIY Toolkit

The Innovation Labs Blog Archive

Nesta, Going Digital

We got 99: Exploring Internet based approaches to support youth mental health

Mindtech, from the National Institute for Health Research
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James is a design researcher and runs the technology studio, Rattle. He is also the CEO of Folksy, an online marketplace for handmade goods and also lectures occasionally in design practice at Sheffield Hallam. Between April 2013 - July 2014 he mentored the seven funded teams through the process of creating their social tech products.

Joe Roberson

Joe is co-founder of Mind Of My Own, the UK’s first self-advocacy app. He also helps charities and social enterprises to fund, build and deliver user-centred and digitally savvy services. Joe has worked with the Labs initiative since the ideation phase in 2011 and was instrumental in capturing and sharing the teams’ learning through 70 articles on the Labs blog.