

HUMAN
LEARNING SYSTEMS



Human Learning Systems: A practical guide for the curious

FULL VERSION 1.1

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A practical guide for the curious

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Foreword



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For some time now, Scotland has been building towards empowered communities with the Scottish approach to public services centred on collaboration with citizens. People are at the heart of all we do; from Self-directed Support and Realistic Medicine, to community empowerment. Despite this powerful agenda, we have not consistently turned learning into actions for sustainable change.

The Centre for Public Impact (CPI) has brought together a wealth of emergent thinking around change in a complex system. This thinking resonates strongly with Healthcare Improvement Scotland's (HIS) aim to drive improvement in the complex landscape of health and social care integration in Scotland. HIS first connected with the work on Human Learning Systems (HLS) four years ago through a shared passion for commissioning for outcomes, and our respective work has evolved through collaborative and sustained discussions.

Throughout the COVID-19 pandemic, HIS learned from colleagues across Scotland about [the things they did at pace](#) to meet people's health and care needs, and importantly what enabled them to do so. Together with CPI, we identified that a key enabler to driving these improvements was the adoption of a learning approach.

At HIS, learning is at the core of our Quality Management System and we welcome this important development, which we believe is fundamental to our collective next steps towards real improvement – the Human Learning System approach.

This guide is a significant step forward in providing people across health and social care with practical guidance on implementing change that can truly shape a system that actively learns and adapts with our complex world, and creates the conditions for each of us to live our best lives.



Foreword



Dee Fraser
CEO, Iriss

In Scotland, we have talked for a long time about the change we want to see in social care, social work and health.

The challenge for us now is how do we roll up our sleeves and get on with creating the conditions to enable a new and better way of working to flourish? How do we stop just talking and start actually doing?

Human Learning Systems (HLS) is a critical step to help us practically move from vision to thoughtful action. It enables us to take this step forward by making learning and experimentation – in pursuit of the best for people – the key force driving our work.

For me, HLS combines three really important things. It is solidly grounded in the real world of public service, understanding the complex interplay of complicated organisations, which are faced with great ideas; strained resources; stretched workers and competing priorities. This is no tidy model, it's designed for working in messy, complex systems.

It provides just enough architecture for good work to flourish. Unlike many approaches it doesn't dictate a recipe to follow for 'success'. Instead, it focuses on creating the right conditions for the work.

It is both realistic and hopeful. With a laser focus on accountability to the right people – the people we support – and management for learning, not control, it demonstrates that with perseverance, change is possible.

Human Learning Systems is a highly practical and engaging approach that provides support for everyone who has ever wanted to make social work, social care and health work better for people.

Please read it and please use it. We can't wait to hear about the changes you will lead and the ideas you will make real.

Thank You and Acknowledgements

This guide has been produced as a collaboration between the Centre for Public Impact, Healthcare Improvement Scotland and Iriss. A huge thank you to all the wonderful people involved in those teams: including Kasia Swiderczuk and Louise Bowen. In particular, thank you to Diana Hekerem and Dee Fraser for commissioning this work, and leading change around it.

The guide, alongside workshops to help organisations explore it, was tested with a brilliant set of organisations who gave up their time to help improve our initial ideas. We would like to say an enormous thank you to:

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1. Introduction

Welcome!

What brought you here? (If the answer to that question is “I read the summary guide, and I want to explore this in more detail”, you can skip straight to [Section 2](#).)

We wrote a “how to” guide to Human Learning Systems because we feel like there’s something fundamentally wrong with how we currently plan and organise public service. And we want to help people to choose to do it differently if they want to.

If you feel that too, then you’re in the right place.

First things first – a little background and joining up of dots.

This guide was commissioned by [Healthcare Improvement Scotland](#) (HIS) and [Iriss](#).

Both organisations have been leading improvement across health and social care in Scotland for some time and saw the work being developed around Human Learning Systems as a key jigsaw piece in the journey towards improving the quality of care and support people access across the country.

Healthcare Improvement Scotland have developed a Quality Management System approach that encapsulates Planning for Quality, Quality Control and Quality Improvement. These are centred on a Learning System approach. With the emergence of the integration agenda, HIS have increasingly applied this approach beyond health services and into social care and community capacity.

Iriss have developed their practice and resources to support a knowledge and learning culture across social work and social care in Scotland. With the emergence of the integration agenda their work is reaching and impacting in health and community settings. Iriss help practitioners and organisations to learn and develop their practice; improve organisational culture; and contribute to changing the system.

Scotland has been increasingly developing policy and legislation which puts choice and control in the hands of its citizens. From Self-Directed Support to Realistic Medicine and on to Community Empowerment and Human rights – there is a strong drive to change how people are empowered to take control and set agendas. This applies both in terms of having increased direct control over their own lives and wellbeing, and also in terms of community led models which see citizen voices shaping local and national services, policies and government.

This guide has therefore been created to meet the needs of people in the health and social care system in Scotland as they seek to undertake their own experiments in Learning System based change. In Scotland, Human Learning Systems builds on the empowerment agenda, and on the improvement work HIS and Iriss have been leading over recent years.

In turn, we at the [Centre for Public Impact](#) (CPI) know that the guide will resonate with a wider audience across the globe, and we thank our colleagues in Scotland for both the opportunity to join them in their journey and support that change, and welcome their input in helping us lead change in public service across the world.

Next, some definitions:

Whether in a health and social care system or more widely, we use a very broad definition of “public service”. We think that any work that serves the public good (we usually frame this in terms of “human freedom and flourishing”) is public service. We don’t believe that public service is a sector. Lots of different types of organisations serve the public good (for example, serving the public good is part of the test of whether an organisation can be a charity or not). This guide is for anyone whose role it is to plan and organise such work.

The task of planning and organising public service is called “public management”. The most common current way of doing public management is called “[New Public Management](#)” – an approach known for the 3Ms: “[Markets, Managers and Metrics](#)”. [Evidence strongly suggests](#) that if public service wants to support human freedom and flourishing – in other words, if public service wants to help people create good outcomes in their lives – then using the Markets, Managers and Metrics approach of New Public Management makes this much harder (and more expensive) than it should be. If you’re reading this, that’s probably been your experience too.

The good news is that those who do the work of organising how public service happens now have a choice about how they do it. The alternative is called [Human Learning Systems \(HLS\)](#). Just as HIS and Iriss have been putting learning at the centre of change and improvement in the health and social care system in Scotland, this guide is intended to help people to put into practice one of the core elements of an HLS approach to public management – the idea of using “[Learning as Management Strategy](#)”.

This guide focuses on the “how” of Learning as Management Strategy. If you are interested in reading about the “why” of HLS, and Learning as Management Strategy, you will find that in the ebook: [Human Learning Systems, Public Service for the Real World](#).

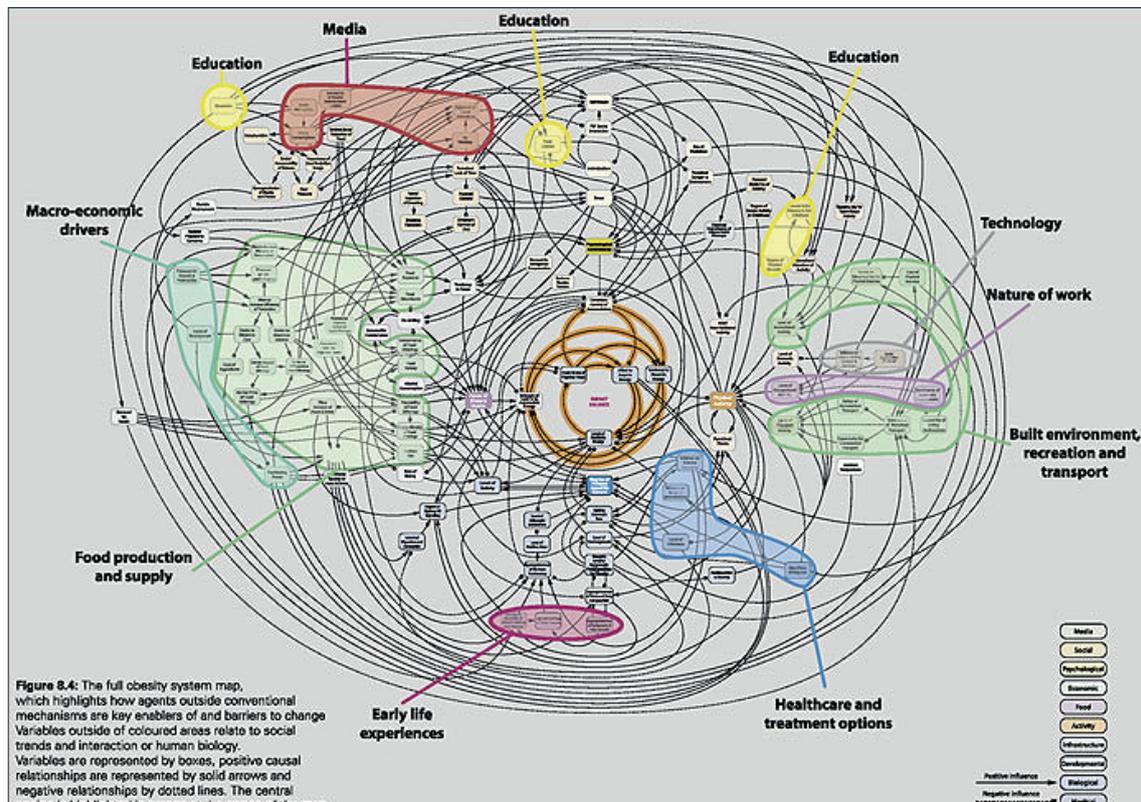
This guide is itself an experiment. It is designed to explore what is useful in supporting organisations to adopt Learning as Management Strategy. We would love your feedback on how useful it is, and what you have done with it, so that we can improve it. If you downloaded the guide from the CPI website, we’ll be in touch to ask you some brief questions about this.

1.1 Creating Outcomes in the Real World

Learning as Management Strategy comes from one simple truth – real outcomes in people’s lives aren’t “delivered” by organisations (or by projects, partnerships or

programmes, etc). Outcomes are created by the hundreds of different factors in the unique complex system that is each person’s life. We can see this clearly in the systems map of the outcome of obesity, created by the UK Government Office for Science in 2007.

Figure 1. Systems map of the outcome of obesity



Sturmborg, JP (2018) *Health System Redesign How to Make Health Care Person-Centered, Equitable, and Sustainable*. Springer, Australia. p238

In other words, an outcome is the product of hundreds of different people, organisations, and factors in the world all coming together in a unique and ever-changing combination in a particular person’s life. Very few of these people, organisations or factors are under the control or influence of people who undertake public service. All of this means that you can’t plan to “deliver” an outcome in the same way as you can plan to “deliver” a workshop.

The reality of creating outcomes in a person’s life requires a different approach to planning and organisation. It requires continuous exploration, experimentation and learning. It is this process of continuous exploration that can be planned and organised. And it is this approach to planning and organisation that this guide offers help with.

Figure 2. The management of complexity

Image credit: Virpi Oinonen www.businessillustrator.com

Because each person's life is a unique, unpredictable and ever-changing complex system that creates outcomes (both good and bad), **the work required to create outcomes is a continuous learning process.** It involves public-facing workers creating a learning relationship with each person being served, a relationship in which everyone develops an understanding of the elements of that person's unique life, which currently creates a particular outcome. Together, everyone helps to explore and experiment with how that life, embedded as it is within a whole set of social relationships, might produce different outcomes.

In essence, the message of this guide is as simple as that – **plan and organise public service work so that workers can understand the complexity of people's real lives and, through exploration and experimentation, learn together with those people what will make a positive difference to them.**

2. How to use this guide

This guide is intended to support those who have the responsibility for organising the work of public service, with the tools and guidance necessary to experiment with applying Learning as Management Strategy in their contexts. It is designed for two purposes:

- i) As an introduction – to be read before you start such work, as a way to help you understand the overall shape of the processes and attitudes that will be required.
- ii) As a reference guide – to help give pointers and to share the experiences of some of the detail of the work, as it has been carried out by others.

2.1 The role of System Stewardship

This guide is designed to help people to enact Learning as Management Strategy by framing the task of management in terms of creating connected Learning Cycles (which we'll describe in [Section 3](#)). It frames the whole job of management as planning, organising and undertaking these learning processes.

The task of creating and running Learning Cycles, and making sure they are managed and governed effectively, is called [System Stewardship](#).

This guide is written for System Stewards. It is designed to assist those who are thinking about how to plan, organise and undertake structured learning processes by helping to frame questions to consider, while offering reflections and examples from those who have done similar work.

The purpose of naming the role of System Stewardship is to highlight that Learning Cycles do not create themselves. Learning Cycles are processes that require planning and organisation: resources must be identified, time must be allocated, people must be engaged, and they will require some sense of the journey they are undertaking. It is the responsibility of a System Steward to do all of this.

The task of System Stewardship can be a role for a particular person, or it can be taken on by a range of people acting together. The key point is that this is a crucial leadership task – it must be someone's role (it can also be a shared responsibility) to ensure that these Learning Cycles function as healthy systems, and this work must be recognised and valued within the organisation or partnership.

In order to play this role, System Stewards require:

- **Legitimacy** – they must be recognised by actors in the system as the appropriate person/people to play this convening role
- **Resources** – they must be able to influence the allocation of human, material and financial resources to enable Learning Cycles to function
- **Learning Competencies** – they must have the skills, knowledge and curiosity required to recognise and coordinate effective experimental and learning activity.

The convening aspect of the work of System Stewardship shares much in common with the tasks and competencies of [Systems Convening](#).

The “HLS Design questions” below (in this colour) are aimed at System Stewards – they are the things that you will need to think about in order to construct effective Learning Cycles.

The other questions and reflection – in the usual text colour – are pointers towards what we have learnt from others about the processes and methods that enable those Learning Cycles.

It is also important to mention that we expect this guide to be used as a rule of thumb rather than a recipe. To help people to think about a purposeful change process, we have laid this out as a step-by-step set of questions and reflections from examples of the work done previously. However, as [this video](#) highlights, *your reality is likely to be messier than will enable you to plan and run this kind of step-by-step approach.*

Additionally, some groups may require other tools at different stages of the learning journey or may want to dive deeper into certain aspects of this work. Not only is that okay, but we’d also actively encourage you to reach out and share learning about what was and what was not helpful for you, and what we can do to help support you on this journey. (This could include connecting you with a group of peers experimenting in similar ways or it might mean more bespoke support on your journey.) See [Section 2.6](#) for further information about how to connect with others who are undertaking similar explorations.

This guide asks a series of questions designed to help you nurture conversations which are rooted in the complexity of real life – to explore how the HLS public management principles could manifest in your context. It offers some pointers for how to systematically create the conditions whereby those conversations become normal and routine. You must discover what those look like, in your context, for yourselves.

2.2 Case studies – examples of Learning as Management Strategy in practice

We thought it would be helpful to include examples of how people have structured their work in terms of connected Learning Cycles. For the initial publication of this guide, we have written up two case studies, one from [Gateshead Council](#), the other from [North Devon pathology services](#). We will refer to these case studies throughout.

We will be continually expanding this bank of case studies, to provide examples from a variety of different contexts.

2.3 The paradox of this guide – planning for emergence

This guide is designed to help you think about, and plan, a process of enacting Learning as Management Strategy. In some respects, this is a paradox – we are trying to help you plan activities which will create emergent results.

Partly, this represents a mindset shift – a shift which embraces the complex reality of how outcomes are actually made. It involves letting go of the pretence that outcomes in people’s lives can be “delivered”, and that the delivery of such outcomes can be planned using KPIs and other traditional management tools. We know that this is not the case.

We think that this guide is useful for a different type of planning – designing the ways for people to explore and learn together the bespoke ways in which outcomes are uniquely created in each and every person’s particular life circumstances. It is these learning processes, practices and cultures that can be planned, managed and nurtured. We hope that this guide helps you to make useful plans concerning:

- The overall shape of the work – helping you to recognise whether you have all the required elements
- The roles which will be required to make this process succeed – who needs to do what type of work
- The skills, capabilities and tools that will be helpful – so that you can be as prepared as possible.

We think this guide can help you to create connected Learning Cycles as **the architecture of emergence** – the things

you can plan and put in place to enable the desired outcomes to emerge.

2.4 A word on mindsets

In one respect, a “how to” guide is an attempt to turn the ideas and practices of the HLS approach to public management into a process which can be undertaken by any public manager. This is in itself a kind of trap.

You cannot enact an HLS approach simply by following a set of processes. HLS requires a mindset and culture shift. It depends on nurturing intangible qualities such as empathy and trust. It requires humanising all aspects of public service workplaces.

This mindset shift happens most powerfully in the day-to-day conversations we have in our work – with our colleagues and with those whom we serve. The content of these conversations needs to change. For example, if you’re a commissioner and you create the kinds of shared learning processes outlined in this guide, but you’re still having conversations with providers about checking whether they’ve hit predefined programme delivery specifications, then something has gone wrong.

From a number of Human Learning Systems case studies, we’ve seen how [genuinely exploring and learning together builds trust](#).

This trust creates the space for different types of conversation and builds confidence to experiment with new ways of doing things. How can you reframe the day-to-day conversations you have in order to develop the curiosity that enables learning together?

2.5 Learning a new language

An HLS approach to public management is very different from previous approaches to management. It doesn't involve setting and monitoring KPIs. It doesn't require you to set SMART targets, or draft service specifications for procurement processes.

This new approach comes with a new language. This may seem like a pain, but it is necessary. The management language we

know – KPIs, SMART targets, etc – reflects and enables the current way of doing things. To do something different, we need a different language. Or as Audre Lorde might put it, "[the master's tools will never dismantle the master's house](#)".

This language will initially be unfamiliar and, like any new language, you may feel clumsy or uncertain using it. Don't worry – this will pass.

To help ease that sense of uncertainty, here is a glossary of some of the key terms associated with HLS:

Phrase	Meaning
Actors	The people and organisations who combine to create outcomes in people's lives, e.g. the person themselves, their friends and family, their doctor or their community workers. (Alongside the factors in a system.)
Co-Design	An element of the Learning Cycle in which relevant actors in the system design experiments and explorations to make purposeful change in that system.
Complexity	<p>The behaviour exhibited by a complex system. A complex system has many different parts that are highly interconnected and interdependent. Complex systems are characterised by emergence (the behaviour of the whole cannot be predicted by understanding the parts), non-linearity, and unpredictability (very small – unmeasurable – changes in starting conditions produce very different results, and consequently unpredictable behaviour), path dependence, and localisation. (The past behaviour of the system influences future possibilities, and these are highly localised – what "works" in a complex system at one place and time won't necessarily "work" in another system in a different place, or in the same system at a different time.)</p> <p>Complex systems require different research methods (for example, Randomised Controlled Trials do not work well in complex systems) and different management strategies for simple or complicated systems. Complex systems can neither be controlled nor designed.</p>

Phrase	Meaning
Countermeasures	Countermeasures are temporary fixes which shield an exploration or experiment from “Business as Usual” processes.
Experiment/ Exploration	An element of the Learning Cycle which undertakes a structured process of testing what happens when particular actions are undertaken – as a way of getting a system to produce a different pattern of results.
Embed	An element of the Learning Cycle to turn experimental changes into Business as Usual at a particular system scale. Embedding is work to create lasting processes, infrastructure and culture.
Factors	The causal drivers which combine to create an outcome in someone’s life, e.g. their housing conditions or their employment status. (Alongside the actors in a system.)
Influence	An element of the Learning Cycle which takes the learning from one Learning Cycle to other Learning Cycles, both horizontally and vertically.
Learning as Management Strategy	An approach to public management which enables public service to respond to the unique complex systems that create outcomes in each citizen’s life. It changes the purposes of management from control to learning.
Learning Cycle	A structured process, coordinated by a System Steward, which enables actors in a system (people or organisations) to: <ul style="list-style-type: none"> • Understand the systems which create the outcomes they care about • Design and undertake explorations and experiments to change the patterns of results in those systems • Embed what they learn in the behaviour and structures of those systems.
<u>Learning Partner</u>	A person or organisation who supports the process of enacting Learning Cycles by helping to develop organisational capacity for learning and experimentation.
Public management	The task of planning and organising public service.

Phrase	Meaning
Public service	Any purposeful activity that supports human freedom and flourishing (i.e. enables people to create the outcomes in their lives which matter to them). Public service is often provided by governments (and their agencies) but can also be undertaken by private businesses or voluntary and community organisations.
Sense-making	A collective process of turning data into meaning. It involves creating space for listening, reflection and the exploration of meaning beyond the usual boundaries, allowing different framings, stories and viewpoints to be shared and collectively explored.
System	<p>A set of relationships between “actors” (people/organisations) and “factors” (structural drivers, such as someone’s income or wealth), which combine to make something (like an outcome) happen in the world. The boundaries of a system (who/what is included/excluded) are created by those who name and describe that system.</p> <p>HLS always think of “systems” in terms of the actors and factors that combine to create a particular desired purpose (an “outcome”).</p>
System scale	<p>Systems which create outcomes can be defined and recognised at many different scales. On a personal level, we can see our lives as a system that creates both good and bad outcomes (made up of the people and organisations we interact with, and the causal forces which impact on us and them).</p> <p>At the level of place (e.g. a town or city), we can see that we could recognise and define a system as a set of people and organisations who combine to create a particular outcome, together with the causal factors that impact on those actors.</p> <p>These two versions of a “system” can exist simultaneously – we’re just looking at them at different scales. HLS have identified five different system scales which seem to be useful:</p> <ul style="list-style-type: none"> • A person’s life as system • A team as a system • An organisation as system • A place as a system • A region/country as a system.

Phrase	Meaning
System Stewardship	The practice of managing and governing Learning Cycles, and the horizontal and vertical relationships between them. It involves convening relevant actors and helping them to learn and experiment together.
Understand the System	An element of a Learning Cycle whereby actors come together to: <ul style="list-style-type: none"> • Establish a shared purpose in terms of a high-level outcome • Identify a set of actors/factors which comprise “the system” • Learn about themselves a system, and learn to trust one another • Draw in knowledge from elsewhere/other systems about how relevant outcomes are created • Build shared understanding of how this system creates the outcomes that it does.

2.6 If you need more help

Hopefully this guide gives you a sense of how you could enact Learning as Management Strategy within your own context. However, if you feel as though you need further help and support to do this, then you have different available options:

- Engage a [Learning Partner](#) – a Learning Partner can help organisations (or programmes, partnerships, etc) to explore how to enact Learning Cycles in your context, and connect you with examples of people and organisations who have done this. You can find a range of potential Learning Partners [here](#).
- Join a Learning Community/Community of Practice – there are a range of different peer learning groups exploring Human Learning Systems approaches
 - If you are in Scotland, in mid-2022 Healthcare Improvement Scotland, Iriss and the Centre for Public Impact will be jointly developing a Learning Community for Scottish organisations who want to experiment with Learning Cycles. More details will be available [here](#).
 - You can search for Communities of Practice using [this map](#) (selecting Community of Practice under the Type filter).
 - If you are in the UK, you can join or start a [Learning Community, supported by Collaborate CIC](#).
 - If you would like to join an international HLS Community of Practice, you can find different options [here](#), depending on whether you are ready to establish your own [Learning Cycles](#), or are just curious to [make sense of how others have done it](#).

3. Creating Learning Cycles

The heart of Learning as Management Strategy is enacting a process of understanding and experimenting with complex systems to try and get those systems to produce a different pattern of results (a better outcome).

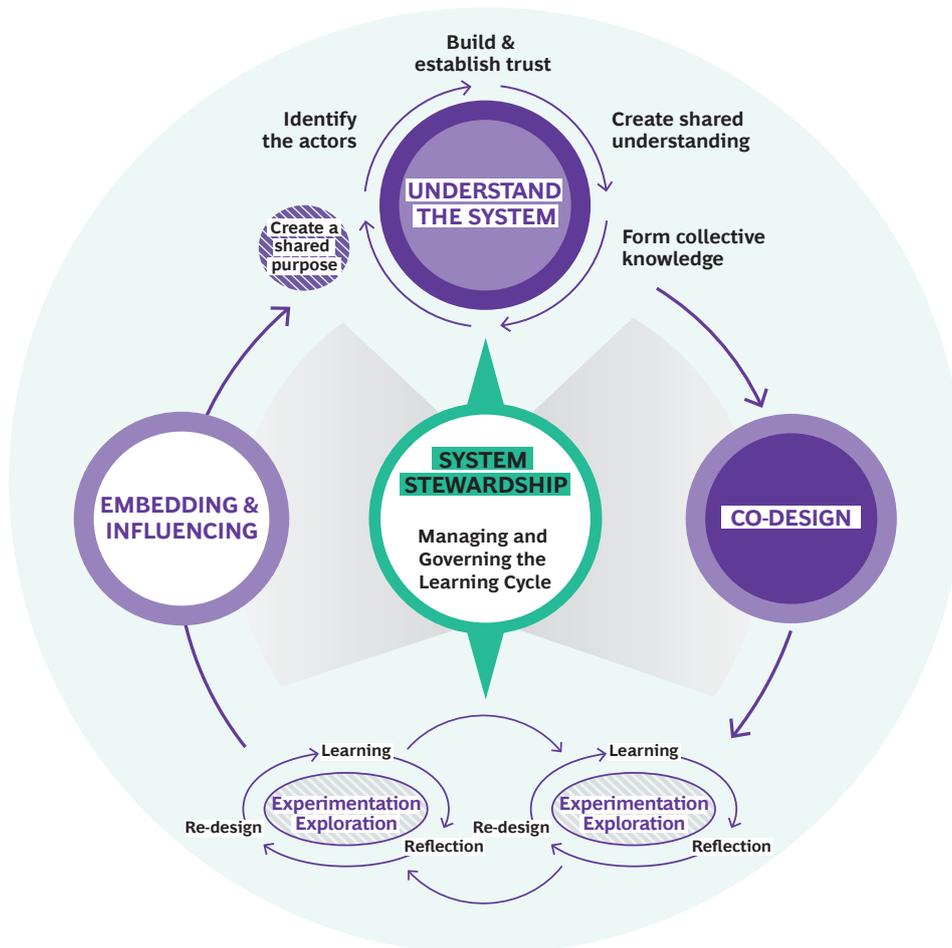
It is this learning process that managers are tasked with planning and organising. Framing that process as a Learning Cycle is one way for managers to plan and organise this work.

A Learning Cycle has five elements or phases of work:

- Understand the system (that produces the outcome you’re looking for)
- Co-Design of experiments/explorations (to get that system to produce different outcomes)
- Experimentation/exploration
- Embedding and influencing (from the results of the explorations/experiments)
- Managing and governing Learning Cycles (System Stewardship).

A Learning Cycle looks like this:

Figure 3. HLS Learning Cycle

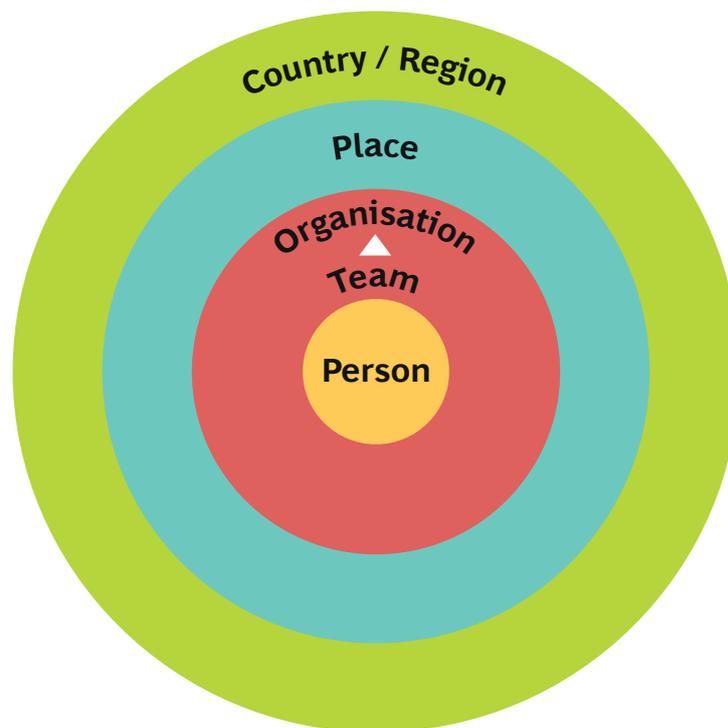


3.1 Learning Cycles at different system scales

These Learning Cycles exist at many different system scales. In the work so far, we have identified five relevant system scales at which people create Learning Cycles (there may be others, and the “order” of these may be different in different contexts):

- A person’s life as a system (Person/ Practitioner scale)
- A team as a system (Team scale)
- An organisation as a system (Organisation scale)
- A place as a system (Place scale)
- A region/country as a system (Region/ Country scale).

Figure 4. HLS System Scales



HLS Design question:

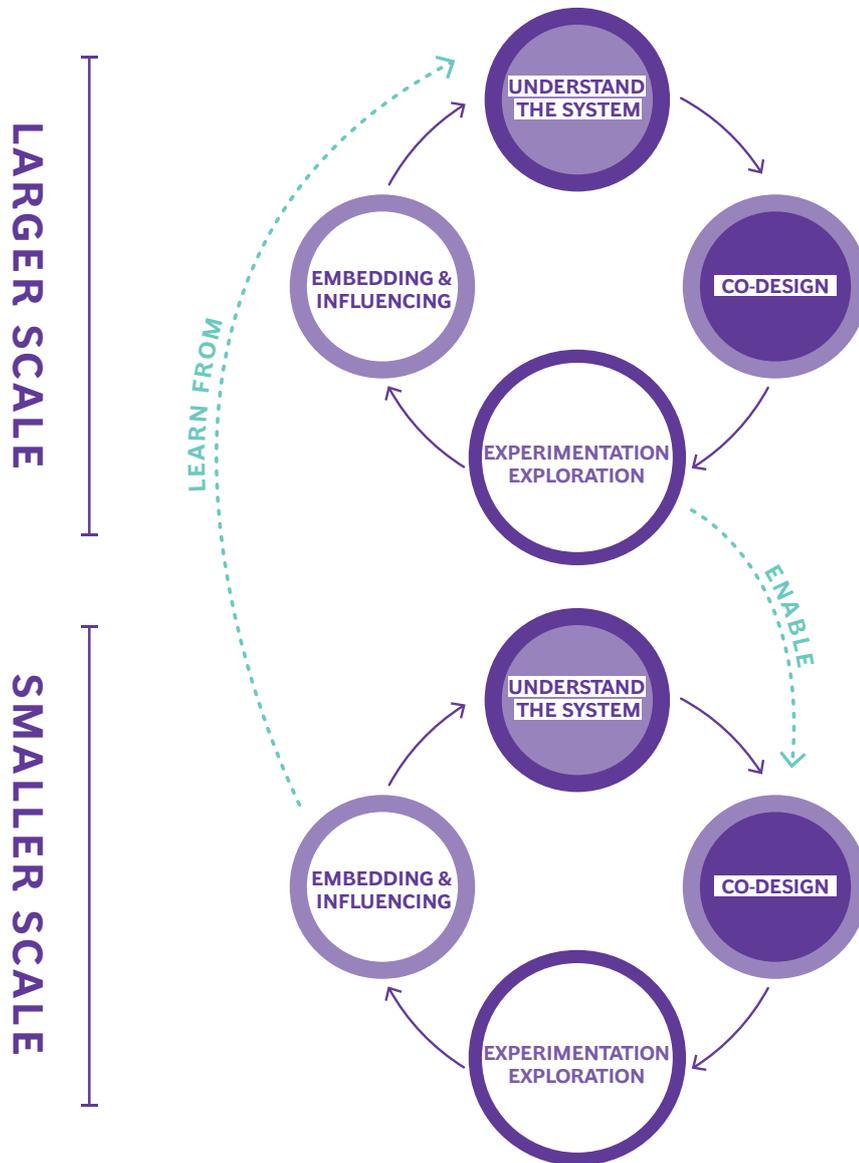
What are the different system scales in your context? Can you name the actors (people/teams/ organisations/places) that are relevant at each scale?

4. Connecting Learning Cycles

People can create Learning Cycles at any of the scales described above (Figure 4). But Learning as Management Strategy really starts to enable fundamental change when people connect the Learning Cycles at different scales to build a continuous learning approach from the ground up.

Learning as Management Strategy works most completely when managers create connected Learning Cycles – vertically across different system scales, and horizontally to other Learning Cycles at the same scale. Vertically connected Learning Cycles look like this:

Figure 5. Connected Learning Cycles



The Learning Cycles at different system scales are connected by two questions:

- What can the Learning Cycle at the larger scale **learn from** the patterns of results of the experiments at the scale below?
- How can the Learning Cycle at the larger scale **enable** the Learning Cycle at the scale below? (What are the “enablers” to be nurtured and the barriers to be identified and removed?)

As you can see from Figure 5 above, the connections between Learning Cycles at different scales are **built from the ground up**. This is crucial. It is this “ground-up” quality which enables real outcomes to be created in people’s lives, because it is only within each person’s life as a unique complex system that outcomes are made.

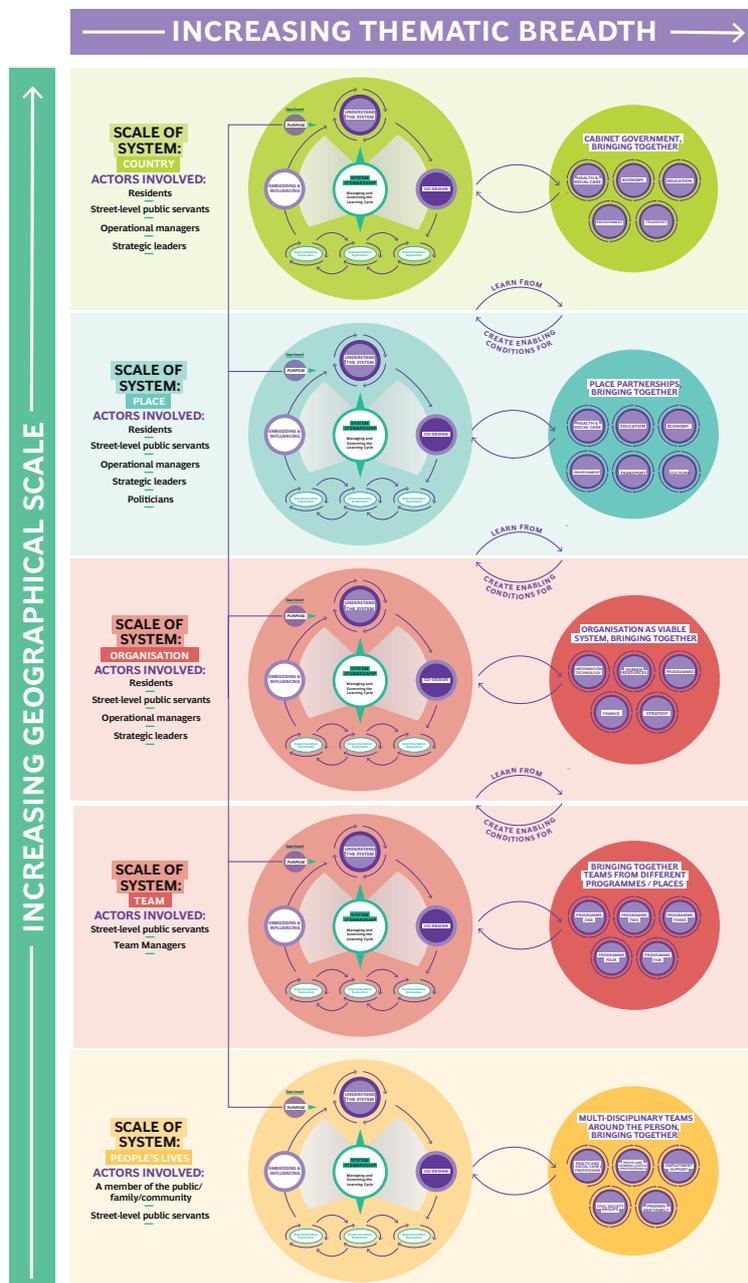
If we (as managers/leaders or other people removed from the immediate work) care about outcomes in people’s lives, then it is our job to enable and learn from these ground-level Learning Cycles – learning between the people being served and those who serve them. The content of all “higher” level Learning Cycles – at organisational, place and country scales – how “the system” is framed and understood, the content of the questions/issues to explore and experiment with – all of this is informed by the reality of the work on the ground (other issues will, of course, also emerge). The key question for higher system scales is: how can this work on the ground be coordinated and governed to enable continuous learning?

4.1 Horizontal and vertical connections

The final point to make is that Learning Cycles are connected horizontally as well as vertically. For example, teams of social workers and teams of mental health workers can easily be seen to operate at the same system scale. The Learning Cycles of these

different teams can be connected to enable different organisations to join up to serve people’s needs. This type of multidisciplinary “team around a person” is increasingly common in many areas of public service practice. Consequently, we will not go into too much further detail in this guide about how to make these kinds of horizontal connections.

Figure 6. Horizontal and vertical connections



5. Creating Learning Cycles – where do I start?

If you want to begin to enact Learning as Management Strategy, where do you start?

There seem to be three guiding principles to help get you going:

- 1) Start where you are
- 2) Connect with other system scales
- 3) It will be messier than you plan for, and that's okay.

5.1 Start from where you are

As you have seen from the previous discussion about system scales, you can create a Learning Cycle within any management context – whether you're a public-facing worker planning and organising your work or you're a strategic commissioner, helping to coordinate the work of different places or organisations.

This means that you can start wherever you are. Bring together the different people/ organisations in your context and begin to reframe the work as learning and exploration, rather than “delivery”. If you're curious about doing things differently, it is likely that others will be too. Find them.

5.2 Connect with other system scales

If you're a public-facing worker, find the manager who is curious about framing their work as a Learning Cycle, and connect your Learning Cycles together in the learning from/enabling way described above.

If you work at higher system scales, and are bringing together teams, organisations or

places to learn together, make sure you're connected to (learning from and enabling) Learning Cycles on the ground. It is dangerous for managers who are disconnected from the work to experiment without involving those who work on the ground, because they will end up experimenting with things that don't come from the work of creating outcomes in people's lives.

5.3 The messiness of Learning Cycles

The Learning Cycle that you plan will not be the Learning Cycle that you end up running. As soldiers are fond of saying: “no plan survives first contact with the enemy”. Or, as Mike Tyson succinctly put it: “everyone has a plan until they get punched in the mouth”.

The messy difference between your plan for a Learning Cycle and how it actually operates in practice reflects the reality of working in complex systems. Don't let fear of the mess prevent you from starting. You cannot plan, and then undertake, the “perfect” Learning Cycle, so don't become paralysed with worry about whether your plan is perfect.

When thinking about planning to start a Learning Cycle, there are two ways that the actual process of creating connected Learning Cycles is likely to be messier than these diagrams suggest:

- 1) The different elements of the cycle may happen concurrently, or in overlapping ways – they may well not follow a neat progression from one to another

- 2) You might well be starting to create change at an organisation, place or Region/Country scale, rather than on the ground.

Take this messiness as read. Nevertheless, we think it may be useful for you to have thought about the different elements of a Learning Cycle, and understand the connections between them, so that you will be able to create a version of this that works for you (or the organisations you support).

The key to accepting the messiness of the reality of Learning Cycles seems to be:

- 1) To make sure each element of the Learning Cycle has its own rapid sense-making and reflection points, so that your understanding of what is happening is continually updated
- 2) To have timely reviews of the whole Learning Cycle plan, so that it can adapt as it goes
- 3) To develop your own capacity for judgement as to when one element of a Learning Cycle can pass to another. And while you develop the experience to make this kind of judgement, borrow from the experience of others by using Learning Partners, or other critical friends.

5.4 Conditions and entry points for starting a Learning Cycle

[Chapter 5](#) of the free ebook *Human Learning Systems: Public Service for the Real World* explored how the conditions required for starting your own exploration/experiment with HLS practice – of enacting Learning as Management Strategy. It has a range of useful information about the required mindsets and roles that are useful for starting to work in this way. We won't repeat all of that advice here.

Here, we will explore the greater detail from the detailed case studies about what is needed to begin your experiment/exploration.

5.4.1 What do you need in order to begin a Learning Cycle?

5.4.1.1 Public-facing practitioner roles that frame/will frame their work as Learning Cycles

The best news about HLS practice is that its foundation is built on people who are already doing this work – those with public-facing roles. Unless there are public-facing workers who are already framing their work as learning with those they serve, or who are willing to try that out, then you won't get very far.

We can see, for example, that the development of Learning Cycles in Gateshead began with a worker in the Council Tax Debt Recovery team who wanted to explore building learning relationships with those in council tax debt, rather than ordering them to comply with enforcement orders made against them. It was this desire for change which helped to create a much larger change.

5.4.1.2 A manager who will enact Learning as Management Strategy

The other key role required for an HLS experiment to get off the ground is a manager who is willing to frame the work of management as a Learning Cycle, learning from and enabling the work of those on the ground. Enacting Learning as Management Strategy requires managers who are prepared to work in this way.

In terms of our framework, we can see that the minimum requirements to make an HLS experiment viable are connected Learning Cycles across the person/practitioner and team system scales. Even if this is all you have, you can make a start.

5.4.1.3 To be rigorous with your learning

From our case studies, the other prerequisite that we can identify for a successful HLS experiment/exploration is that you are rigorous with your learning approach. In essence, the greater your learning rigour, the more convincing a case you can build for the way of working among those not initially

involved. For example, in the Gateshead case study, rigorous analysis of the case-by-case costs and effects of the existing council tax debt enforcement processes – together with a comparison with the experimental approaches developed by the team – were crucial in bringing others on board.

“Rigorous” will mean different things depending on your context, and the types of methods you employ, but it is safe to say that the following are necessary:

- Mixed methods approaches – you will need the skills to be able to capture and analyse both quantitative and qualitative data – particularly narrative-based methods, such as Appreciative Inquiry
- Good data collection and storage – you will need to capture data from as many perspectives as are required by your system, and that data needs to be stored in such a way that makes it accessible to any who need it (and not accessible to those who must not see it – your research ethics are crucial, because they are the basis of trust)
- Transparent analytical processes – the ability to show your working to others
- Shared sense-making – involving others in extracting meaning from data
- Willingness to recognise the value of information in different formats
- Capacity to capture and interpret complex information for different stakeholder information needs (technical, descriptive, concise) and learning styles.

5.5 Growing your HLS experiment

5.5.1 The more system scales involved the better (within limits)

In general, we have seen from the case studies that the more system scales involved in Learning as Management Strategy, the more sustainable it is. However, you will be able to see how many system scales are necessary for the particular explorations you undertake, because the Learning Cycles will stop uncovering issues that need to be addressed in other horizontally or vertically connected Learning Cycles.

In the Gateshead case study, for example, they were able to stop at the “organisational” scale, because changes to local authority policy and practice were enough to make the new ways of working sustainable. In the North Devon example, by contrast, the Learning Cycles continued to the national scale, because change was required there.

5.5.2 System Stewardship – creating horizontal and vertical connectivity

To make a complete “learning stack” – of connected Learning Cycles across different system scales – therefore requires System Stewards to actively connect and convene Learning Cycles across different system scales. In Gateshead, for example, this involved the Director of Public Service Reform convening sessions with senior leaders whose directorates were impacted by the experiments that were created by different Learning Cycles at the Team scale.

6. The Detail of Learning Cycles

6.1 Stage I: Understand the System



We will now explore the detail of the work which enables each stage of the Learning Cycle to function effectively.

The “Understand the System” phase of work is a process whereby actors come together to:

- **Establish a shared purpose** in terms of a high-level outcome, from the perspective of those the system seeks to serve (e.g. to help [a particular person] to lead a thriving life, or to live well in the final stages of their life). This enables you to...
- **Identify a set of actors/factors** which are “the system” – the set of relationships in the world which help to achieve that purpose. This process of identification enables you to say “these are the people/forces that we are interested in, and will pay attention to”
- **Learn about yourselves as a system, and learn to trust one another:** understanding yourselves as an interconnected, interdependent set of people and organisations, who can learn together in order to work towards the purpose
- **Draw in knowledge from elsewhere/other systems:** systems are rarely just “local”, and understanding the system which creates outcomes in people’s lives will involve drawing in knowledge and information from beyond the immediate set of actors
- **Build shared understanding of how this system functions as a system:** try to explore collectively all that it is sensible

to know about how the desired outcomes are created in your context. You will have achieved this when you are able to say confidently “I think we have a pretty good, shared understanding of what is going on here and what we need to do to experiment with meeting our shared purpose”.

Questions to ask at this stage:

The Understand the System phase comprises a set of work in which you define the purpose of a system (and therefore draw the boundaries of that system). And then you seek to understand the relationships that constitute that system.

To undertake this aspect of your Learning Cycle, the questions and activities set out in sections 6.1.1 to 6.1.5 should be helpful.

6.1.1 Clarifying purpose

- **What is your purpose?**

Clarify your purpose, from the perspective of the individual or group that “the system” seeks to serve.

Identifying a purpose enables you to define the boundaries of your system: who are the actors (people/organisations) involved? And what are the factors (causal drivers) which contribute to, or get in the way of, achieving that purpose? You may be familiar with

the idea of expressing purpose statements in terms of *outcomes for people*. This is quite good practice – but make sure those outcomes are expressed in terms of:

- Desirable things in the lives of the people being served (not, for example, things you want to change about your organisation)
- High-level outcomes – the only people who have the right to define a specific outcome in their lives are the people themselves. Your outcomes should be high-level ones, meaning that each person/community can define specific outcomes for themselves.

Examples of good purpose statements include:

“We want the people of Gateshead to lead thriving lives, free from debt”

or

“We want the people of North Devon, and those supporting them, to make informed decisions about their health and care”.

Questions in purple are questions for System Stewards to consider when planning/designing the whole work of creating connected Learning Cycles.

HLS Design question: who gets to make an initial formulation of the purpose of the system?

6.1.2 Identifying actors in this system

- **Who are the actors making up the system that helps achieve your purpose?**

Once you have identified the purpose, you can identify the actors within your geography that help to achieve that purpose. List

them. (Or better still, map them and their relationships with one another.)

You will need to revisit this purpose later, once the actors are learning together (see section 6.1.3).

HLS Design question: by what process will you identify the actors to achieve this purpose? How will you know that relevant/people organisations haven't been missed out?

Tools that might be helpful:

- [System mapping \(actors\)](#)

6.1.3 Building trust between those actors

- **What are the relationships between those actors? How can they collaborate and learn together?**

As a System Steward, your key task at this stage is to help those actors to recognise that they are a system which achieves a particular purpose (outcome). This means that they need to recognise one another as actors in a system, and to recognise the relationships between those actors. Particularly, they need to understand how they can learn and act collaboratively. For example, [this](#) work in Gateshead revealed key aspects of the relationship within and between organisations by asking the question: “how do you learn?”

As part of this process, the System Steward will need to enable the actors involved to reframe and agree the purpose of the system for themselves. It needs to be recognised as a shared purpose, rather than a purpose

given by the System Steward(s) who initially defined the boundaries of the system.

Given that at least some of these actors are likely to have existing relationships, how will you make those visible to all concerned?

How can you help all of those actors to recognise the ways in which they learn, and act, together? What works well, and what is missing from the current arrangements?

HLS Design question: how will you help all the actors to see what the quality of relationships are like between actors in the system? How will you help people to reflect on how well they are able to learn?

Tools that might be helpful:

- System mapping (actors)
- [Appreciative Inquiry](#) [HLS case studies such as the [Plymouth Alliance](#) (see also the illustration example in this guide) have used Appreciative Inquiry as a method to help build shared understanding]
- [SenseMaker](#)
- [Warm Data](#)
- [Critical Social Learning System](#)
- [Storytelling for Systems Change](#)
- [Sense-making](#)
- Relationships Project – [Kit for Councils](#) – a pack for local authorities to support strong community relationships.

- **How does your purpose relate and connect to similar purposes of others?**

What are the connections to similar/related purposes in your place? What are those actors doing?

As a System Steward, how will you make connections between people with similar purposes in your geography (i.e. horizontal connections to other Learning Cycles)? How can you make sure that your framing of the “the system” doesn’t become a rigid silo that ignores the broader interdependent nature of the world?

HLS Design questions: what are the spaces in which you need to spend time when making these connections? Who are the people you need to connect with?

6.1.4 Identifying factors in the system, and drawing in knowledge about them

- **What are the factors that influence the system which helps achieve your purpose? How do the actors learn together about those factors?**

For example, what is known about what enables the people of Gateshead to thrive? And what gets in the way of their thriving? What information do people and clinicians need to make informed healthcare choices?

6.1.5 Creating shared understanding – learning together

As a System Steward, how will you help the actors to gather together the various types of knowledge and understanding that are relevant to achieving that purpose? What is the “state of the art” knowledge regarding the factors influencing the creation of relevant outcomes from the latest research? What are other actors doing to support the relevant purpose in other places? And how will you enable them to make sense of that information collectively?

HLS Design question: how will you help all the actors to share knowledge about relevant factors and make sense of that information?

Tools that might be helpful:

- System mapping (factors) – such as creating causal loop diagrams, [process maps](#), or using [System Effects](#) method
- [Appreciative Inquiry](#) [HLS case studies such as the [Plymouth Alliance](#) (see also the illustration example in this guide) have used Appreciative Inquiry as a method to help build shared understanding]
- [SenseMaker](#)
- [Warm Data](#)
- [Critical Social Learning System](#)
- [Storytelling for Systems Change](#)
- [Sense-making](#)
- [Outcomes Star](#)
- Summarising and sharing existing knowledge – primary and secondary research, lived experience

6.1.6 What this looks like at different system scales



Above, we have attempted to describe the design questions to help a System Steward to frame the Understand the System task at any system scale. We will now explore the specific considerations to think about at each of the particular system scales.

Person/Practitioner Scale

At this scale, “the system” is the set of actors/factors which combine to create the desired purpose in each person’s life.

Therefore, **“the system” is unique for each and every person**, because each person’s life has a unique set of relationships and causal factors which combine to create the outcome in their context.

As a practitioner, you can help the relevant actors to understand themselves as a system which can produce the outcome of a thriving life and to have a reasonable understanding of the factors that combine to create such an outcome.

Learning the systems that create outcomes in people’s lives

There is an important subtlety to the public management practice (what this guide is concerned with) around this work. From the perspective of a practitioner, we are describing a work relationship and work practices. The activity to undertake this work must be planned to fit within a reasonable workload and timescale. Resources must be organised so that they are in the right place at the right time. Information and learning must be recorded and shared with others who need to know. And so on.

However, from the perspective of the person being supported, theirs is a life to be lived, not work to be managed. They may well value the increased self-awareness and agency that comes through exploring their life as a system, but the whole point of the work is that it creates something of value in their life as they experience it. If the management of the work starts to feel like external management of their lives, then it has failed. This exploration has to feel authentically human, to the person for whom it is most significant.

This is both the power and the danger of a public service focus on “outcomes”. It is right that public service focuses on helping people to create positive outcomes in their lives. But in bringing people’s lives into focus for public service, those lives must be recognised as beyond the scope of management.



Person/Practitioner Scale continued

The exploration should also be built on the foundations of the person/people's expertise in their own life. They have significant knowledge about the unique nature of their life/lives as complex systems which are likely to be invisible to anyone else. Making effective use of this expertise is a crucial part of the learning relationship that the practitioner is tasked with creating.

Key questions

The questions that are important for a worker to ask concern **what matters to the person being supported**. And, as all workers who do this well know, you won't necessarily hear deep truths the first time you ask that question. It often takes time for people to build a level of trust with one another before they will start talking about what really matters to them (as the Gateshead case study demonstrates). Experimenting with how to build trust in that person's life could well provide the content for the first time around the Learning Cycle at this scale.

Tools

The tools that are likely to be most valuable at this system scale are those that build a learning relationship between the worker and the person/people they are supporting. What will enable workers and those people to see and understand the nature of their lives as systems?

These are almost certainly conversational tools – such as [Motivational Interviewing](#), narrative-based learning tools such as [Appreciative Inquiry](#), or tools which help build a picture of the key aspects of a person's life, such as [Outcomes Star](#).

Team Scale

Identifying “purpose” at Team scale and above is a process of blending the purpose identified from the perspective of the people being served (e.g. “we want the people of Gateshead to lead thriving lives, free from debt”) with the issues that have arisen from the Learning Cycles at the Person/Practitioner scale (e.g. “we need to be able to make in-the-moment spending decisions to support residents' unmet needs”).

Combining these two gives a purpose to a Learning Cycle at the Team scale: “we want to make rapid spending decisions in order to help people to live thriving lives, free from debt”.

At the scale of “team-as-system”, the Understand the System work is largely concerned with understanding the conditions which support this purpose.

The system that needs to be understood is therefore the set of relationships, spaces and processes which enable that team to function as an effective learning environment, in respect of that purpose.



Team Scale continued

Understanding how the team functions as an effective learning environment therefore entails learning from the reality of the work as it is carried out at the scale below, and identifying considerations which come from other horizontal and vertical systems (such as legal constraints).

Key questions:

Learning from questions

- What are the patterns that we can see from across all of the Learning Cycles at the “person as system scale”?
- What do these patterns tell us about the changes we need to make:
 - In the practice of each team member?
 - In the way that the team functions?
 - In the way that other teams and processes – both horizontally and vertically – function?

For example, in the Gateshead case study, by analysing all the team members’ spending patterns across the Learning Cycles with all the people they were supporting, they found that they were buying a lot of furniture for people. As a consequence, they built a relationship with a local community furniture recycling charity, and were able to source cheaper, recycled furniture for the people they supported.

Enabling questions:

Teams are also concerned to understand the processes and resources which enable each of them to perform well (or not) in their work as Learning Cycles.

For example, in the Gateshead case study, an analysis of the issue logs identified that the Community Caseworkers needed to be able to make autonomous, on-the spot spending decisions, rather than having to come back to the team meeting and make a request for petty cash.

Tools:

- Team meetings run as Learning Cycle debriefs – it seems necessary to run team meetings as collective sense-making sessions, using the data gathered from Learning Cycles at the scale below
- Case files – ways to record the activity of Learning Cycles at the scale below
- Issue log and complexity analysis – ways to analyse whether the issues identified in sense-making are for action at a personal level, team level, or for other systems (horizontally or vertically).



Organisation Scale

Identifying “purpose” at Organisation scale and above is a process of blending the purpose identified from the perspective of the people being served (e.g. “we want the people of Gateshead to lead thriving lives, free from debt”) with the issues that have arisen from the Learning Cycles at the Team scale (e.g. “we need to be able to make auditable, in-the-moment spending decisions to support residents’ unmet needs”).

Combining these two gives a purpose to a Learning Cycle at the Team scale: “we want to make auditable, rapid spending decisions in order to help people to live thriving lives, free from debt”.

At the scale of “organisation-as-system”, the Understand the System work is largely concerned with understanding the conditions which support this purpose.

The system which needs to be understood is therefore the set of relationships, spaces and processes that enable that organisation to function as an effective learning environment, in respect of that purpose – for example, the relationship between the organisation’s different teams and functions. The system which needs to be understood is therefore the set of relationships, spaces and processes enabling that organisation to function as an effective learning environment.

Understanding how the organisation functions as an effective learning environment therefore entails learning from the reality of the work as it is carried out in teams (the scale below), and identifying considerations which come from other horizontal and vertical systems (such as funding agreements).

What are the patterns that we can see from across all of the Learning Cycles at the Team scale? Key questions are likely to include:

Learning from questions:

What do these patterns tell us about the changes we need to make to the organisation’s purpose and the strategy by which it operationalises that purpose:

- At all the scales below?
- At the Organisation scale?
- In collaboration with other organisations at the Place scale?

For example, in the North Devon case study, the pattern that they discovered was that GP practices were ordering unnecessary, resource-intensive tests which were not providing useful information to people or clinicians.



Organisation Scale continued

In the Gateshead case study, they identified patterns which raised questions about the boundaries between different “programme” teams, such as Community Caseworkers and Social Workers.

Enabling questions:

- How do different programme teams learn from one another?
- How does the relationship between finance and programme teams (and the processes by which this relationship is mediated) affect the delivery of programme activity?
- How do the ways in which IT systems operate affect programme work?
- How does the way in which HR and performance management operate impact on programme work?
- What are the skills and capabilities requirements of the organisation to enable effective Learning Cycles at all scales?
- How will the organisation recruit and train for those skills and capabilities?

All these are likely to be concerns at the “organisation-as-system scale”.

Tools:

- [Appreciative Inquiry](#) – can be used as a tool at the Organisation scale as a way of enabling different parts of an organisation to understand the challenges of different work, and to build empathy between people playing different roles.
- [Process mapping](#) – can be particularly useful to reveal the reality underpinning policy decisions, particularly when used to map the journey of people being served through public service. This can be particularly useful in highlighting the wastefulness of [failure demand](#).
- Countermeasures – in order to protect experiments that are happening at the Team scale, leaders often create “countermeasures”, i.e. ways to protect those experiments from the normal rules and processes that would apply in Business as Usual. These countermeasures are usually temporary agreements to suspend particular rules and processes in order to enable experiments to run.
- Senior management meetings as learning environments – in order for organisations to learn, senior management roles must also be learning roles. Senior management meetings should (at least in part) be shared sense-making environments, which undertake pattern-spotting and learning.
- [Outcomes Star](#)



Place Scale

At the “place-as-system” scale, the nature of the system to be understood is the relationships between the actors and factors which help to achieve purpose (create outcomes) within that geography.

The actors at the Place scale who are likely to contribute to helping people to create outcomes in their lives are:

- The people being served (sometimes identified through “experts by experience” groups, for example)
- Workers that those people directly and indirectly interact with
- Managers from those service organisations
- People from local authorities, and other public service strategic management bodies (in a UK context, Integrated Care Partnerships/Systems or benefits agencies, for example).

The particular actors and factors can be identified from an analysis of the record experiments at the system scales below – both the “person’s life as system” and the “organisation as system” scales. The system actors will also need to identify, and respond to, issues arising from their horizon-scanning of factors that influence the work as a whole – for example stemming from technological, environmental or cultural change – and changes to their political landscape.

The system which needs to be understood is therefore the set of relationships between the relevant actors and their capacity to learn together and reflect on the appropriate factors.

What are the patterns that we can see from across all of the Learning Cycles at the scales below? Key questions are likely to include:

Learning from questions:

What do these patterns tell us about the changes we need to make to the place’s purpose and the strategy by which it operationalises that purpose:

- At all the scales below?
- At the Place scale?
- In collaboration with other places at the national scale?

For example, in the North Devon case study, a pattern that they discovered was that there was concern that the new, experimental forms of testing may lead clinicians to miss important diagnoses.



Place Scale continued

Enabling questions:

- What are the relationships like between the different organisations that contribute to achieving outcomes for people?
- What are the factors which have shaped those relationships? (E.g. competition between organisations creating an atmosphere of distrust?)
- How do organisations learn together, and what learning infrastructure is required at the Place scale to enable cross-organisational learning?
- How are organisations funded to learn?
- What performance management mechanisms are embedded in this funding?
- Which of those funding/performance management arrangements can be changed by actors at a local scale?
- What are the skills needs of organisations across the place?

All these are likely to be concerns at the “place-as-system scale”.

Tools:

- [Appreciative Inquiry](#) – can be used as a tool at the Place scale as a way of enabling different parts of an organisation to understand the challenges of different work, and to build empathy between people playing different roles.
- [Process mapping](#) – can be particularly useful to reveal the reality underpinning policy decisions, particularly when used to map the journey of people being served through public service. This can be particularly useful in highlighting the wastefulness of [failure demand](#).
- [System mapping \(actors\)](#) – identifying the range of people and organisations who need to learn collaboratively.
- [System effects](#) – a way to enable actors to identify and prioritise system factors.
- Storytelling – capture and analysis methods, such as [Appreciative Inquiry](#), [SenseMaker](#), [Warm Data](#) and [Storytelling for Systems Change](#), can help build a shared understanding of the nature of the problem from different perspectives, and help build empathy across different people and organisations.
- [Sense-making](#) – a mechanism to enable different actors to create collective meaning from the available data.
- [Outcomes Star](#) – a way to build up population-level outcome information from particular cases.



Region/Country Scale

At the “Region/Country-as-system” scale the nature of the system to be understood is the relationships between the actors and factors which help to achieve purpose (create outcomes) within that geography.

The actors at the Region/Country scale who are likely to contribute to helping people to create outcomes in their lives are:

- The people being served (sometimes identified through “experts by experience” groups, for example)
- System stewards from the Organisation scale
- System stewards from the Place scale
- Officials and politicians from the Regional/national scale.

The system which needs to be understood is therefore the set of relationships between the relevant actors and their capacity to learn together and reflect on the appropriate factors.

What are the patterns that we can see from across all the Learning Cycles at the scales below? Key questions are likely to include:

Learning from questions:

What do these patterns tell us about the changes we need to make to the Region/country’s purpose and the policy/strategy by which it operationalises that purpose:

- At all the scales below?
- At the Regional/national scale?
- In collaboration with other countries at a transnational scale?
- What national-level policy changes might be needed from those patterns?
- What are appropriate national scale policy/programme interventions?
- Do rural and urban places require different types and levels of relationship infrastructure?

For example, in the North Devon case study, they discovered that while the Carter Review of Pathology Services was emphasising the need to reduce cost-per-test and variation in testing practices, North Devon’s learning was suggesting that cost-per-test was a misleading measure and there was a need to focus on test-requesting practices rather than the supply-side of how labs operate.



Region/Country Scale continued

Enabling questions:

- How do places learn (together)?
- What are the national-scale barriers to (or enablers of) places learning effectively?
- How are places funded to learn?
- What performance management mechanisms are embedded in this funding?
- What are the skills needs of places?

All these are likely to be concerns at the “place-as-system scale”.

Tools:

- as per the Place section (above)

HLS Design question: By what mechanism will you spot patterns from across the different places, which might require national-level change?

HLS Design question: how will you help all the actors to share knowledge about relevant factors and make sense of that information?

6.1.7 Moving to the next stage of the Learning Cycle

The point of understanding the system before designing an experiment/exploration is to give yourselves as much contextual knowledge as is necessary to create the right thing to try. But how much knowledge of the system is enough?

An important point of caution to take note of here: you will never have perfect knowledge of the complex system you have identified. Don't delay action in the pursuit of perfect knowledge. There are many aspects of complex systems which you will only discover by taking action within them. And, by their nature, your actions will change how the system works.

We think that people are ready to shift from this phase of “learning for understanding” to “action learning” when the actors in the system understand themselves as a learning system. We think the indicators of this are that they:

- Are able to express a shared purpose, from the perspective of the people being served – for example “our purpose is to provide information to clinicians and their patients to enable them to make good healthcare decisions”
- Have enough of an understanding of the patterns of interactions between actors and factors in the system to be confident to create experiments which seek to change those patterns of interaction.

6.2 Stage II: Co-Designing experiments/explorations:



The co-design process is shared between the relevant actors in the system that you have identified in the previous stage – starting with the person in whose life the outcomes are being created. During this stage, the actors design explorations/probes/experiments which seek to change the pattern of interactions between actors and factors in that system.

The essential nature of a complex system is that it behaves in unpredictable ways, and the most effective way of creating purposeful change is to engage with it and see what happens. When doing this, the key is to undertake exploratory action which has fast-paced feedback and reflection loops.

6.2.1 Typologies of experiments/explorations

6.2.1.1 Hypothesis testing experiments/explorations

These are experiments which have specific research questions relating to known problems and an identified hypothesis for actions, which can answer the research question and address the identified problem.

For example, if Place X has similar problems with substance misuse as Place Y, and recognises that Place Y has been doing interesting work to address those problems, then Place X might develop the hypothesis that: “the approach in Place Y could help address our substance misuse problem”. And so, it might generate the research question: “how might the principles and/or practices from Place Y be applied in our context?”

6.2.1.2 Probes/changing current complex patterns

Another type of experiment/exploration which HLS practitioners have developed

is more like a probe of a complex system.

This approach identifies a particular inquiry question – for example “how do we improve the health of homeless people?” – but does not have a particular hypothesis to test in terms of answering the question. Instead, the exploration is more of the type: “what happens if we try [action X]?”

In this case, the action is simply designed to provoke a reaction and change within the current pattern of results produced by the system, with the idea that by understanding how the system reacts to a provocation, further change can be created.

It is important to note that the goal is not necessarily to design an exploration/probe/experiment using the methodology and approaches of the natural sciences. Those types of experiments require controlled conditions which almost certainly won’t exist for you. You do not need to try and artificially recreate these controlled conditions in your exploration, as to do so would likely invalidate the exploration you are seeking to undertake by removing the exploration from the complex reality of the work. It is partly for this reason that some people prefer the language of “exploration”, rather than “experiment”.

6.2.2. Establishing “Inquiry Questions” for your experiment

If (as in the North Devon case study) your purpose is: “to help people and clinicians to make good healthcare choices”, then this is a good inquiry question for your experiment:

- What types of clinical tests do people and clinicians need to make informed healthcare choices?

HLS Design question: who gets to set the questions you are going to explore?

6.2.3. Designing actions in response to the inquiry questions

You can think about designing a set of actions to test a hypothesis, or undertake a probe that responds to the inquiry questions using the following lines of exploration (this is not an exhaustive list):

6.2.3.1 What actions should we try?

- What are the key factors in the system that produces the outcome you’re looking for (with reference to your work to “understand the system”)?
- What does the broader evidence say are effective actions in other contexts?

6.2.3.2 Who needs to be involved in the action?

- Who are the people who lead opinions in this space?
- Who has the power to stop this?
- Who has the energy to see change happen?

6.2.3.3 How do we enact this experiment?

- What permissions do you need?
- What countermeasures will you need to put in place? I.e. how will you protect the experiment from “Business as Usual” processes? Whose agreement will you need for that?
- What is the timescale?
- What do you need to do this well?

HLS Design questions: what skills, capabilities and permissions do the people involved in designing these experiments need?

6.2.4 Designing methods for data collection, analysis, and sense-making

Answering these questions should help identify how you can reflect on the effects of your experiment(s):

- What data will you collect and how (understanding that many different types of data exist – qualitative, quantitative, narrative, artistic, experiential, etc)? An interesting example of the use of quantitative data in this context is the use of the [Outcomes Star tool](#), or other [person-shaped measures](#). When used as a tool for shared sense-making, rather than as a performance management tool, Outcomes Star can create the opportunities for excellent sense-making conversations ([see attached illustration](#)).
- Who will analyse this data?
- How will you collectively make sense of what the data means? (How will all the people involved in the experiment make sense of the data that is collected?)

- What is the pace of data-gathering, reflection and analysis?
- How will you know that you've answered this question?
- How does reflection influence future practice? How will you adapt as you go?
- How will you share what you learn as you go? Who will you share it with?

HLS Design question: do the people involved have the mindsets, skills and tools they need for capturing data and sense-making? What help/support will they require to do this?

6.2.5 Creating the enabling conditions for experimentation

6.2.5.1 Making it safe to “fail”: setting rules

By their very nature, explorations in complex systems produce unpredictable results. Some of what happens as a result of your explorations will look like failure. This is absolutely necessary. If some of the things that you try don't fail, then it is unlikely that you're genuinely exploring. Instead, you're just playing it safe.

A key question is therefore: how do you make it safe to fail? What are the parameters for failing safely? For example, what are rules that provide effective guardrails for your explorations? (Rules that others have used include: “stay legal”, and “do no harm”.

6.2.5.2 Collective sense-making – understanding the connections between experiments/explorations

A key role of the System Steward is designing (and then convening) collective sense-making – a process which enables the actors involved to make sense of the data from the explorations and experiments. The key question here is: what mechanisms do System Stewards need to enable different actors in the system to understand what is happening with each of the experiments, and collectively make sense of the changes that are being created.

HLS Design questions: what structures are required for data collection and sense-making?

For example, what IT systems are needed? What are the groupings/meetings which will make collective sense of the data? Do they already exist? Do they need to be created? What help/support will they require to do this?

6.2.6 Tools:

- Innovation Centre of the National Education Agency for Finland (EDUFI) – [Experiment Generator toolkit](#)
- Video journaling
- [Learning Pods](#) – structured, team-based learning conversations
- [Person-shaped measures](#).



6.2.7 What this looks like at different system scales

Person/Practitioner Scale

Once more, the framing of the idea of experiments and explorations will look and feel different from the perspective of a practitioner as against the perspective of the person whose life this is.

From that person's perspective, the process of exploration/experimentation must feel empowering. It must feel like a process which supports them in gaining a better understanding of their lives and of how the actors/factors in their life combine to produce desirable or undesirable outcomes.

From our case studies, we have seen literal experimentation at this scale – clinicians and patients ordering blood tests to help better understand a person's condition. And practitioner/public experiments such as “what happens if I buy some groceries for this person? Will that build trust so that they can tell me more about what is happening in their life?”

One of the core questions at this scale is: how should practitioners record what is happening with their experiments in ways which are systematic and yet with minimal bureaucracy? As an example, The Plymouth Alliance used video recording of material as ways to document experiments – training their staff to use their mobile phones to capture how experiments were going.

HLS Design question: how will you develop (and record) “person-shaped measures” – i.e. measures that are unique for each person/set of people being supported?



Team Scale

At the Team scale, we have seen that the experiments that people want to design are often about how the team is enabled to do its job more effectively.

For example, the Community Caseworkers in the Gateshead case study found that they did not have a way of rapidly accessing the resources they needed to meet immediate public need. One person needed food in their house, and the team initially had to come back and seek permission to access petty cash to go shopping with the person. Consequently, the team decided to create an experiment of getting organisational credit cards, so that they could make immediate, real-time spending decisions.

The experiment design therefore needed to capture information about what was spent on the cards and match it to identified client need, so that the team leader could be satisfied that the spending was appropriate, and that the team could be trusted with autonomous spending decisions.

Organisation Scale

At the Organisation scale, experiments are designed which change organisational policy, process and structure.

Change in policy, process and structure are things that often require investment and significant coordination across many different aspects of the organisation. Consequently, these experiments can take more time, and involve more people from different roles.

From the North Devon example, we can see that nurses, GPs and lab staff from GP practices, together with people from pathology labs and healthcare assistants (HCA) worked together to explore what different blood tests would help clinicians and people make better, more informed choices about their healthcare.

The data they planned to capture for those experiments included:

- The numbers of different types of tests being ordered, and by whom
- The experience of patients, nurses and GPs ordering and using those tests.

Sense-making of this data was planned to be carried out by all the actors from those different organisations.

At the Organisation scale, the Gateshead example demonstrates a Learning Cycle that was constructed by the programme's team leader (the Director of Public Service Reform) together with the Director of Finance and members of the internal audit team.



Organisation Scale continued

They needed to explore how the use of credit cards by the programme team for autonomous spending on clients could be made properly auditable. They developed and tested “principles” for such autonomous spending, and captured data about how those principles were being applied. Members of the programme team, together with the team leader and finance team, were then able to analyse and make sense of this data, uncovering spending patterns which enabled more effective resource use.

Collective sense-making

Organisations working in an HLS way will likely have a number of experiments running simultaneously. An important issue for System Stewards at the Organisation scale is therefore to avoid fragmentation, and an absence of learning, between different experiments and explorations.

A key question to ask is: what sense do we make from across all the different experiments/explorations that the organisation is undertaking? Responding to this seems to require that there be collective sense-making mechanisms created at senior management level.

Crucially, this changes the role of managers and senior leaders – from people who monitor and have oversight of programme delivery to people whose role it is to continuously design and sense-make experiments in organisational change. In this way, the nature of “organisational change” also changes – change is not created by one-off change projects or programmes. Rather, change is a continuous process of experimentation that all are involved in.

Where do experiments originate from? The dangers of “divorced” management experimentation

One important point to remember is this – the experiments designed at Organisation scale need to come from addressing issues which relate to achieving purpose that is focused on outcomes for the people being served.

For example, in the North Devon case study, the problems with pathology services were identified at the Organisation scale. Crucially, however, the pathology services did not try to experiment with making change directly within their organisation. Instead, they went to explore the question from the perspective of clinicians and the patients they served. Thus, they reframed their purpose away from “processing as many blood tests as quickly and cheaply as possible” towards “helping clinicians and patients to make good choices”.

Expressing purpose in this way helped avoid the danger of designing organisational experiments whose real purpose is to make the job of managing easier.



Place Scale

At the Place scale, the experiments that are designed are likely to concern the strategies, policies and processes of partnership arrangements – for example, experiments in how funding can encourage and enable collaborative learning between organisations.

As with all scales, the experiments are action research explorations which try out ways to continue to support effective practice and to address the challenges raised from the Learning Cycles at the scale below.

For example, in the North Devon case study, actors at the Place scale (commissioners, pathology services, GP practices) were keen to explore how new testing protocols and procedures developed by experiments at the Organisation scale could spread throughout GP practices. This involved showcasing stories from patients and clinicians.

The data to be captured included testing rates from across all GP practices, together with the experiences of clinicians. Sense-making was to be undertaken by all the relevant actors at the Place scale.

Collective sense-making across and between organisations and other actors

Connected to the above point about the diversity of actors required to learn together effectively, a key aspect of undertaking System Stewardship at the Place scale is shared sense-making. Bringing together different types of data and different types of experience, so that all can collectively determine their meaning, seems to be a crucial task for System Stewards. What will these shared sense-making processes look like in your context?

In addition, System Stewards at the Place scale need to work particularly hard to avoid fragmentation and an absence of learning between different experiments and explorations. A key question to ask is: what sense do we make from across all the different experiments/explorations undertaken by all the different organisations/actors? The Place scale is also a helpful scale to spot patterns and relationships between different purposes.

HLS Design questions:

How will you ensure that all relevant actors are part of sense-making at the Place scale (including those whose voices you have traditionally found difficult to hear)?

What infrastructure is required at the Place scale to enable data to be collected and to have shared sense-making processes? Who will convene and enable this infrastructure?

How will you enable sense-making across different types of experiments, exploring how to enact different types of purpose?

Region/Country Scale



At the Region/national scale, the experiments that are designed are likely to concern the strategies, policies and infrastructure required to enable effective work at the Place scale and below. These would include experiments in how funding can encourage and enable collaborative learning between places, and in the infrastructure required for cross-place learning and pattern-spotting.

“Humble Government” – the importance of subsidiarity/devolution

One of the key challenges facing those seeking to design experiments/explorations at the national scale is to tone down policymakers’ natural impulse to design delivery programmes at the national scale. National-scale programmes which specify a particular intervention to be “implemented” in all relevant people’s lives are unlikely to be helpful in creating real outcomes in complex environments, because they assume that national government can know enough about the detailed content of each person’s life to specify an appropriate intervention. In a complex system, this is never the case.

Instead, acknowledging the complex reality of people’s lives requires that national governments recognise the limits of their potential knowledge about delivery contexts. The reality of outcomes demands that governments adopt a “[humble](#)” stance in relation to their capacity to know what public service should do in the context of people’s lives. They are required to devolve decision-making about what public service offers to people to those who have detailed knowledge of their lives – people themselves, and those public service workers who have strong and meaningful relationships with them.

But if governments aren’t designing experiments to create national delivery programmes, what is the likely content of the experiments/explorations that they design...?

Building infrastructure and capacity for learning

National governments cannot specify what is required in people’s lives, but they can explore and experiment with the public service infrastructure that enables Learning Cycles to work at personal, organisational and Place scales. For example:

- What relationship infrastructure is required to enable effective Learning Cycles at the personal scale in different places?
- What infrastructure and processes are required to enable places to learn from one another?
- What are the information systems which enable those learning conversations?
- What workforce skills and capacities are required?
- What support do places need to create effective learning systems?
- How should national government fund local public service in order to enable Learning Cycles?

Region/Country Scale continued



For example, the [EDUFI Innovation Centre](#) designed an experiment to explore how the education expertise held by civil servants within EDUFI could contribute to effective local-scale experiments, rather than shutting down experimentation by saying that they already had all the answers. It designed a mentoring programme for civil servants to help develop their sense of curiosity about local contexts, and to enable them to be more helpful to experiments at local scale. It captured data about their experience, and those of local places, and groups of civil servants and local actors together made sense of that data .

Also, in the North Devon case study, actors at the national scale were keen to explore how national-level infrastructure could be made to align with the reality of practice as understood at Place scale and the scales below.

6.3 Stage III: Running the experiments



Once the action research experiments/explorations have been designed, the next stage is to undertake them.

Running experiments involves following the experiment design, and creating appropriate sense-making and re-design points which follow the initial period of data capture and reflection. In this way, the actions to support the creation of outcomes by the systems of people's lives should adapt as they go.

The key processes and practices of the experiments/explorations should have been created at the design stage. **When running the experiments, you need to ensure that you are recording the data that you said you would record, and undertaking the collective reflection and sense-making required to interpret that data.**

However, the nature of experimentation/exploration in complex environments is such that:

- You will likely uncover things that you did not expect
- The context surrounding the exploration/experiments will change.

Therefore, it is vital to think about:

- The patterns you are seeing from the explorations/experiments – what are they telling you about what change is happening, and what further explorations may be required?

- How you make room for the unexpected – by definition, the data you planned to capture will not be the only relevant information required to make sense of your experiments. How will you bring in other data/voices into reflection and sense-ing processes?
- How you respond to change – as soon as you have finished designing your experiment/ exploration the world will have changed in both large and small ways. How does your exploration need to adapt to these changes?

6.3.1 “Countermeasures” – protecting the experiments from Business as Usual

These action research experiments/ explorations will create ripples and disturbances within the “established system” (at whatever system scale you view it). In other words, they will upset “Business as Usual”, whether that “business” is the existing day-to-day habits of a person’s life, or the established procedures of a team, organisation or place partnership. These disturbances are the point of the experiments!

You will have been able to predict some of these disturbances in the design phase, and created appropriate countermeasures to protect the experiments from Business as Usual. However, some of these disturbances will be unexpected. These will require active sensing of who and what is being disturbed, and connecting with those people/processes to agree the appropriate countermeasures.

6.3.2 Learning within the system

We think that there are two types of learning that come from undertaking experiments/ explorations:

6.3.2.1. Learning about the work

For example, when the Community Caseworkers in Gateshead bought groceries with the resident who had no food, they learnt about how that person’s life as a system responded to that kind of intervention. They learnt that such activity helped to build trust, without creating a dependency relationship.

6.3.2.2. Learning about how to organise the work better

For example, when trying to buy food, the Community Caseworkers discovered that the mechanism for accessing the resources that were available for exactly this kind of purpose (coming back to the team and asking for petty cash) was too slow and cumbersome. So, they learnt that the team would need to experiment with different ways of organising their work.

In Gateshead, they created an “issue analysis” tool to identify who was able to act on this type of learning. They broke it down into:

- Things that I can explore how I do differently
- Things that the team can explore how to do differently at this system scale
- Things that require experimentation at other system scales.

6.3.3 Iterating

In a complex system, it is rare for an experiment/exploration to “solve” a problem once and for all – this isn’t the point of such experiments/explorations, because the pattern of results that the experiment creates is never completely stable. Micro and macro changes in the world will destabilise it again at some point.

Instead, the purpose of learning from an experiment/exploration is to learn enough to iterate a new and better experiment/exploration next time. What you learn from one set of experiments will very likely set you up to try something else in future.

For example, in the Gateshead case study, the underlying purpose of the person-scale experiment to buy food for the person wasn’t to solve their ongoing problem with having no food in the house. It was to see if buying food would enable the resident to trust the Community Caseworker enough to tell them what was really going on in their life. This experiment was successful because the resident disclosed that they had problems with their benefits. Thus, the Case Workers were able to begin a new experiment with that person to see if they could address their benefit issues.

6.3.4 Learning for different system scales

One of the important aspects for capturing learning from experiments is to classify the different types of learning that an experiment creates. You will likely find two different kinds of things:

- Things that are relevant to the behaviour of the system at that scale – ones which actors at that scale can address themselves

- Things that relate to structural factors associated with broader or higher system scales – ones which actors at those other system scales must address.

HLS Design questions:

How will data from experiments be recorded and made sense of? What processes are required to do this systematically?

What are the spaces in which sense-making will occur?

How will you connect new people into the experiments? (From the induction of new staff members, through to making new connections due to unexpected results or a changing world.)

How will you spot unexpected disturbances? Who will have the role of creating and enacting countermeasures? How will you ensure they have the capacity and authority to do this well?

6.3.5 Tools:

- The Gateshead issue analysis template helps to classify learning for different system scales
- [Outcomes Star](#)
- Case files/notes.



6.3.6 What this looks like at different system scales

Person/Practitioner Scale

When running experiments/explorations at this Person/Practitioner scale, it is particularly important to remember that the process of self-knowledge and exploration/experimentation itself will have changed crucial aspects of a person's "life as system".

For example, in the Gateshead case study example, purchasing food for a resident with no food in the house built a trusting relationship which changed that resident's sense of the type of change that was possible in their life. This exemplifies the iterative nature of such experiments/explorations.

It is interesting to explore the meaning of "countermeasures" at this system scale. What does it mean for a practitioner and resident to create countermeasures which protect explorations from Business as Usual, when Business as Usual is likely to include a person's life habits (ones they may not even be fully aware of)? Coaching approaches, such as [Mayday Trust's Personal Transitions Service](#) seem particularly relevant in these cases.

It is also interesting to note the approaches to shared data capture and sense-making which can underpin such practitioner/resident conversations. The [Outcomes Star](#) has a particularly strong reputation for enabling practitioners, and those they support, to use data to have conversations about how the work is progressing.

Team Scale

Experiments/explorations at the Team scale require effective processes and systems for recording and making sense of data.

As per the Gateshead case study, team meetings seem ideal places in which to undertake sense-making sessions, in which team members lay out the evidence that captures how different experiments are progressing, and what is being learnt from each one.

Turning team meetings into these kinds of learning environments seems to be absolutely crucial.



Organisation Scale continued

Experiments/explorations at the Organisation scale are likely to take longer, and involve a wider range of organisational stakeholders – such as HR, IT and finance staff, as well as people directly delivering programme activity.

This means that such experiments/explorations will require data which makes sense to a number of different disciplines and perspectives (what will a finance person find useful? What will an HR person need to know?) and sense-making practices which allow all of those different perspectives to be heard and mutually understood.

The Organisation scale is where countermeasures seem to be particularly useful. Organisations have established ways of doing things. These are bound to be affected by the experiments, in ways which might be difficult to see (particularly in large organisations).

The Gateshead case study addressed a challenge made by the leader of the team who were conducting experiments in tandem with a colleague in HR. They wanted to identify the other parts of Gateshead Council likely to be most affected by the experiments. This enabled the team leader to connect proactively with those colleagues and begin conversations about appropriate countermeasures to protect the experiment.

Role of leadership

The role of leaders in organisations is particularly important in running effective experiments/explorations. Leadership is required to signal the importance of learning and experimentation. Furthermore, staff across the organisation need to be made aware of the importance of learning and experimentation, and to be prepared to join in with experiments which arise from seeking to address issues raised by the work.

Place Scale

As with the Place scale, experiments and explorations involve a wide range of actors. This challenge is multiplied, because the range of people and organisations, and the different personal and organisational cultures which are “normal” for them, is likely to be very broad.

The key challenge at the Place scale is to ensure that the appropriate infrastructure exists to enable collective sense-making across this range of actors.



Place Scale continued

HLS Design questions:

Given that different actors at the Place scale will be simultaneously experimenting with different types of things, how will such explorations/experiments be coordinated? How will sense be made of all of these things? What spaces will be required for this?

Similarly, the issue of “countermeasures” becomes more complicated at the Place scale. Given that one actor’s experiment might need protecting from the Business as Usual of a different organisation, how will such conversations be enabled?

The role of leadership at the Place scale is therefore as crucial as for organisations.

Region/Country Scale

Learning from experiments and explorations at the Regional/national scale is likely to involve the greatest degree of variety.

Collective sense-making – understanding the connections between experiments and explorations

Convening and facilitating collective sense-making between places also enables national-level actors to make sense of the different patterns from across different places. Understanding these patterns – for example, how rural is different to urban, or the different patterns within places with different population demographics – helps the national level to understand what is an appropriate and necessary variation between places, and what is unacceptable.

HLS Design questions:

Given that different actors at the Regional/national scale will be simultaneously experimenting with different types of things, how will such explorations/experiments be coordinated? How will sense be made of all of these things? What spaces will be required for this?

The national scale is also a helpful scale to spot patterns and relationships between different purposes which began at the Place scale. For example, the national scale enables exploration of any questions requiring large numbers of examples to understand patterns effectively.

6.4 Stage IV: Embedding/influencing



As the effects of the explorations/experiments become known – both those that worked and those that didn’t – the actors in the system can begin to embed changes in both behaviour and structure in the systems that have created the desired outcomes at their system scale. They can also influence the Learning Cycles within systems that are horizontally and vertically connected to their own.

The experience of those who have undertaken this work suggests that the learning from experiments/explorations has “eureka” moments – sudden realisations that immediately reveal necessary changes, and “slow reveal” knowledge that creeps up on people. It is important to leave space for both of these.

6.4.1 Embedding

Embedding is a process of turning experimental changes into Business as Usual at a particular system scale. Embedding is work to create *lasting process, infrastructure and culture*. This is what “sustainable” change means – turning the results of those experiments/explorations, which identified different ways to do things, into “that’s the way that things are done around here”.

Depending on the system scale at which this work happens, this can be a change in the processes, structures and cultures around which a person orders their life, or a change in the processes, structures and cultures of organisations or partnerships.

For example, in the Gateshead case study, at the “organisation as system” scale, we can see that the new financial recording arrangements for autonomous spending by Community Caseworkers had proved successful in creating auditable spending

which improved outcomes for residents.

Thus the “embedding” task at this system scale was to continue with this set of financial recording and auditing protocols – they became Business as Usual.

6.4.1.1 Countermeasures and embedding

Countermeasures are temporary fixes that shield an exploration/experiment from Business as Usual. One way of understanding countermeasures is that they are the first step in embedding change in Business as Usual. A countermeasure acts as a flag to say that some aspect of Business as Usual might not be helpful in the future.

It is important to record the existence of countermeasures – because they need to be removed at the end of the exploration/experiment. Either the exploration showed that the aspect of Business as Usual being shielded requires change – likely an experiment at a higher system scale. Or simply that the experiment finished, and so that practice no longer requires protection. In Gateshead’s case, these countermeasures included the team leader signing off on credit card spending for audit purposes. Once the credit card audit process had been approved, this countermeasure could be removed.

In the North Devon case study, embedding work took place at both the organisation

and Place scales. The new testing protocols developed by some of the GP practices improved information for clinicians and patients, and reduced costs. These protocols then replaced the previous test-ordering regime. Embedding was undertaken by a combination of staff training and integration of the new testing protocols within the electronic test-ordering system.

6.4.2 Influencing

Influencing is the work of taking the learning from one Learning Cycle to other Learning Cycles, both horizontally and vertically. This is why it is important to categorise learning from experiments in terms of changes which can be made within a system scale, and changes requiring further exploration by others. Once issues are tagged as “requiring change by others”, then these issues can become part of the Understand the System work of a different Learning Cycle – one which is either horizontally or vertically connected.

For example, in the Gateshead case study, we see how the Community Caseworkers flagged the issue of their lack of ability to respond to residents’ immediate needs through low-level autonomous spending. This was not an issue they could change by themselves, and therefore it had to be addressed with Learning Cycles at the Team, and ultimately, Organisation scales.

In the North Devon case study, we see how the changes to blood test protocols at the Organisation scale did not simply spread horizontally from GP practice to GP practice. Instead, they recognised that Place scale experiments would be required in order to spread change. They created a new clinical governance space (the Pathology

Optimisation Forum) at the Place scale to enable knowledge to spread, and to create a vehicle for ongoing Place scale learning.

In this way, we see how “Influencing” other Learning Cycles is the HLS equivalent of “scaling”. Rather than saying to other places – “you will implement what we have learnt” (which leads both to resistance and to processes and practices that are inappropriate to a given context), it says “you can use what we have learnt to inform your own learning”.

What is scaled is therefore the practice of learning itself. This is the essence of Learning as Management Strategy.

The work of influencing involves creating space to explore the implications of experiments at all of the system scales where they have effect. It is an active process of boundary spanning and convening. This is the aspect of the System Stewardship role which operates between system scales, and between Learning Cycles at the same scale – the System Steward connects different Learning Cycles both horizontally and vertically. System Stewards act as the connection between the “influencing” stage of one Learning Cycle and the Understand the System stage of a different horizontally or vertically connected Learning Cycle.

We see an example of this in the Gateshead case study, where the Director of Public Service Reform took the issue around the auditability of credit card spending identified by experiments at the Team scale, and convened meetings with the Director of Finance and internal audit team to understand the challenge of auditable autonomous spending at the Organisation scale.

6.4.3 Continuing the Learning Cycle

Complex challenges are never “solved” – because complex systems are rarely stable over long periods of time. Just when you think the system you have identified is in equilibrium – that everything is running just so – something happens to destabilise it (see COVID for details). This means that the task of purposefully intervening in complex systems to get them to produce positive outcomes is never complete.

Exploring and experimenting with such systems will have created/revealed aspects of the functioning of that system which are

new, or were not previously visible to the actors within it. **Running the explorations/experiments will have changed the actors’ sense of what is possible.**

For example, in the Gateshead case study, the Learning Cycle at the Person/Practitioner scale continued after the initial experiments of “does buying food for people build trust to talk about deeper things?” Undertaking this kind of action did build trust between the Community Caseworkers and residents, and so they were able to understand more about the system of that person’s life, and different types of conversation became possible.

6.4.4 What this looks like at different system scales:

Person/Practitioner Scale



Embedding

At the person/practitioner system scale, embedding is the task of stabilising new patterns of interactions in a person’s life as system – to enable the ongoing production of desired outcomes.

A key question in this respect is “what are the social structures which can be created and nurtured to help embed change in person’s life?”

Influencing

This involves connecting learning from the person’s life into other Learning Cycles, both horizontally and vertically:

- Horizontally – e.g. changing their pattern of interactions with other public service, for example ensuring that people get the right benefits
- Vertically – changing how public service work is organised, e.g. in the Gateshead example, changing how Community Caseworkers can spend resources autonomously.



Team Scale

Embedding

Embedding at the Team scale is a process of translating experimental action into new team processes, procedures and infrastructure.

For example, in the Gateshead case study the team created team meeting processes in which their focus was debriefing and learning from cases.

Influencing

Influencing at the Team scale involves connecting horizontally and vertically to Learning Cycles in other systems (or system scales). See the Gateshead example cited in the above section.

We have seen that, from a Team scale perspective, influencing Learning Cycles at higher scales (organisation, place, etc) can be a process of **convening** Learning Cycles at those higher scales – Learning Cycles which are created around particular issues, e.g. solving a finance issue in Gateshead, or spreading new blood test protocols in North Devon.

We see that such higher-scale Learning Cycles aren't necessarily standing bodies (i.e. groups of people who have a regular meeting cycle, which gets filled up with particular content).

HLS Design question:

Is it helpful to have standing Learning Cycle bodies (for example, the senior management of an organisation)? Would this be a useful part of your overall HLS exploration?

Organisation Scale

Embedding

Embedding at the Organisation scale is the process of turning the results of experiments/explorations into changed processes and infrastructure.

Creating new processes for an organisation requires a significant time investment. Creating new infrastructure is likely to be even more time-consuming, because this kind of investment requires sustained collective action. The results of initial experiments can therefore be used to create coalitions for change among groups of interested people, both within an organisation and beyond.



Organisation Scale continued

Before an organisation commits to turning any kind of experiment into a lasting process and infrastructure, it is likely that they would want a conversation with other organisations in the “place as system”. For example, is it helpful to have a way of recording interactions with people being served that enables information-sharing between organisations?

There may well be, therefore, a tight connection between embedding at the Organisation scale and embedding at the Place scale. We saw this, for example, in the North Devon case study, in which embedding the new blood test practices required work at both organisation and Place scales.

Influencing

As described above, influencing at the Organisation scale may be tightly connected to embedding, as it may be difficult for organisations to embed new ways of working if other organisations in the relevant geography are not doing the same.

For example, in the North Devon case study, influencing involved setting up a new forum for dialogue and convening across North Devon – the Pathology Optimisation Forum.

Place Scale

Embedding

At the Place scale, this could involve creating a new partnership infrastructure to enable more effective information-sharing and collaboration between organisations. It may require new information systems, which capture feedback about the experiments and explorations being undertaken, and enable those to be shared across a place.

In the North Devon case study, they created new clinical governance infrastructure – the Pathology Optimisation Forum, as a mechanism to have ongoing learning conversations about system improvements.

What embedding will almost certainly require is new processes and infrastructure around resource allocation and management (commissioning and contract management, in UK terms). The fundamental basis on which contracts are created, let and managed will need to shift in order to promote trust, honesty, collaboration and shared learning. Long-term changes in these types of infrastructure are what will create sustainable change.

Influencing

Influencing at the Place scale seems largely to involve making connections to Regional/national spaces which set the conditions for local working.

Region/Country Scale



Embedding

Embedding at the Regional/national scale is work to create appropriate strategy, policy, processes and infrastructure which sustain the smaller system scales' capacity for continuous learning.

In particular, this means creating and sustaining infrastructure which enables:

- Direct relationships between public-facing workers and the residents they serve. In many countries, resourcing levels for this infrastructure is determined at a Regional/national scale. In these cases, it is the responsibility of the national scale to ensure that there are sufficient resources to enable public service relationships to function.
- Cross-place learning and pattern spotting.

Influencing

Influencing at a Regional/national scale will most often entail horizontal connections between different areas of government/public service.

Ensuring that these different purposes are able to learn together continuously is a key role of a System Steward at this scale.

In some areas of work, such as global development, there may be an influencing role for the national to the transnational scale – for example, influencing how transnational development organisations conduct their programming.

6.5 Stage V: System Stewardship



System Stewardship is the practice of managing and governing Learning Cycles, and the horizontal and vertical relationships between them.

Under an HLS approach, this is the core of management practice. In this way, learning shifts from “nice to have” to becoming the heart of an organisation’s (or partnership’s, etc) management strategy and approach. Rather than “learning” being additional work, organising learning processes becomes the primary focus of management work.

Therefore, whatever management practices an organisation/partnership uses – team meetings, practice review sessions, “clinical supervision”, appraisals, programme management/steering groups – the content of what is discussed in these sessions is people’s approach to running Learning Cycles, and what comes out of them.

If you are convening, managing or governing these learning processes and practices, these may be helpful questions to think about.

6.5.1 Managing a Learning Cycle: HLS Design questions

Managing a Learning Cycle is the practice of organising people and resources so that these learning processes and practices happen well. Here are some useful questions to consider when planning how you will manage the Learning Cycle:

What are your plans for enacting each of the phases/elements of the Learning Cycle? Who will be convened? How will you know what is happening?

How will you check progress against those plans, and adapt them accordingly?

What resources does the Learning Cycle require? Where will you get them from? How will their use be tracked?

Who will act as a System Steward to make horizontal and vertical connections to other Learning Cycles?

And these questions may be helpful questions to ask when you are managing a Learning Cycle:

- Is the Learning Cycle operating effectively? What needs to change about how it is working?
- How much time do we need to allocate to this Learning Cycle?
- What other resources are required?
- What is enabling you to enact this Learning Cycle?
- What barriers are you finding?
- To whom do you need to connect, horizontally and vertically? How will you find this out?

In respect of the final question, for example in the Gateshead case study, the director of Public Service Reform sought the help of an HR team member. For each of the experiments they were undertaking in the Learning Cycle, he asked – “who else in the council is this experiment likely to affect?” And then he sought those people out to help create Learning Cycles in their contexts.

6.5.2 Governing the Learning Cycle: HLS Design questions

Governing a Learning Cycle is the practice of helping those undertaking the Learning Cycle to account for whether it is happening as they would want it to.

Here are some useful questions to consider when planning how you will govern the Learning Cycle:

By what means will the Learning Cycle be governed? Who is responsible for helping those undertaking it to account for this work?

What is the role for horizontal accountability? How do all actors in the system hold one another to account for effective participation in this learning process?

How will residents (particularly those being served) play a role in these accountability processes?

What is the role of elected officials in these accountability processes?

Who is acting as System Steward? How will they make an account to those undertaking the governance function?

Who is included in/excluded from this Learning Cycle? Are those boundaries correct?

And these questions may be helpful questions to ask when you are governing a Learning Cycle:

- What is the integrity of the learning and adaptation processes?
- Are people participating authentically in learning?
- Are lessons being learnt?
- How is learning translating into changed practice?
- How is practice translating into new infrastructure?
- How is our learning achieving our purpose?
- How do we know?
- What evaluation mechanisms and processes are required?
- How do we provide an account of this learning? To whom?
- Who is included in/excluded from this learning cycle? Are those boundaries correct?

6.5.3 What this looks like at different system scales:

Person/Practitioner Scale



As described above, managing and governing a Learning Cycle at the Person/Practitioner scale looks very different from a practitioner's perspective compared to a resident's perspective.

From a practitioner's perspective, they must manage their time effectively, and ensure that any other resources are used appropriately. Theirs is work that can be managed.

From a resident's perspective, theirs is a life to be lived. So, the task of managing this Learning Cycle between practitioner and resident must be one which demonstrates the value of this learning process to the resident. They must develop trust in this learning relationship.

In Gateshead, for example, Community Caseworkers built this trust by listening effectively, and responding to any immediate needs to the best of their abilities. "I've heard that you have no food in the house. Let's go grocery shopping." They ran this as a deliberate trust-building experiment to encourage further participation in the learning relationship.

Learning Cycles at this scale will involve a range of actors who are not controlled by practitioners – for example neighbours, community organisations, other public services. Managing a Learning Cycle at this scale is therefore significantly a task of bringing resources together, of developing a sense of shared purpose among actors who have a variety of motivations and purposes.



Team Scale

Managing a Learning Cycle at the Team scale is often the responsibility of a team leader/manager. They have the capacity to turn team meetings into learning environments. In Gateshead, for example, team meetings were used as case debrief sessions, undertaking issue spotting and pattern analysis. **Creating this kind of learning environment is the primary management task at this scale.**

Team leaders/managers are also in a good position to help the team monitor and reflect on time and other resource use.

Organisation Scale

Management

The management of Learning Cycles at the Organisation scale will likely entail addressing the following types of questions and issues identified by teams and practitioners:

- **Infrastructure issues**, such as information systems. For example, “how do we systemically record and share the experiments that practitioners are supporting?”
- **Finance and audit issues**. For example, “how will spending on experiments be audited? Are there enough organisational resources allocated to enable the work to function effectively?”
- **Workforce capability issues**. For example, “how can we ensure that all our practitioners have the skills to support the people we serve in order to co-design and run effective action-research experiments?”
- **Process issues**. For example, “how do we change our Performance Management approach to focus on learning?”
- **Culture issues**. For example, “how do leaders signal a switch to Learning as Management Strategy?”

People who have responsibility for those functions will therefore need to be convened in Learning Cycles. There seem to be different ways for an organisation to respond to these in terms of the management of Learning Cycles:

- In Gateshead, the Director of Public Service Reform convened **ad hoc, issue-based Learning Cycles**, working with senior leaders who were affected by the particular issues arising from the Team scale.



Organisation Scale continued

- The other option is to create **new standing bodies** responsible for managing Learning Cycles – for example, groups of senior leaders. These bodies have an ongoing responsibility to manage and govern Learning Cycles in the organisation. In the North Devon example, they created a new standing body – the Pathology Optimisation Forum (albeit at the Place scale, rather than the organisation one).

These options are not mutually exclusive.

Governance

Governance questions start to emerge at the Organisation scale. The core questions for the governance of Learning Cycles are:

- “Is this happening in the way we intend?”
- “How will those undertaking the work of Learning Cycles account for that work?”

At the Organisation scale, these are questions for bodies such as scrutiny committees within local authorities and boards of trustees/non-executives of voluntary sector and health organisations.

Place Scale

Management

The management of Learning Cycles at the Place scale will likely entail addressing the following types of questions and issues identified by organisations:

- **Infrastructure issues**, such as information systems. For example, “how do we systemically record and share the experiments that organisations are supporting?”
- **Workforce capability issues**. For example, “how can we ensure that all our organisations have the skills to support the people we serve in order to co-design and run effective action-research experiments?”
- **Resource allocation issues**: “how do we commission/fund in order to enable Learning Cycles to function effectively?”
- **Culture issues**. For example, “how do leaders signal a switch to Learning as Management Strategy?”
- **Policy and strategy issues** – “how will the learning from Organisation scale and below be translated into new policy and strategy?”



Place Scale continued

People who have responsibility for those functions, across different organisations, will therefore need to be convened in Learning Cycles. In North Devon, as described above, a new standing body was created to manage the Learning Cycle at the Place scale.

A key aspect of undertaking System Stewardship at the Place scale is the question of how to bring different types of actors together into a “healthy” learning system. At a Place scale, many different types of actors will be involved, each with very different experiences, capabilities and resources. These include:

- The people being served
- Community (and other self-organising) groups, with particular lived experience relating to the purpose of the system
- Voluntary sector organisations with paid staff, including cultural organisations
- Different types and branches of public sector organisations – e.g. benefits agencies, healthcare, social care, economic development, and education
- Private sector organisations – from freelancers through to larger-scale businesses.

How will the System Steward enable an effective learning system amongst all this diversity? In particular, how will the System Steward address structural inequalities, mistrust built on experience of marginalisation to develop relationships in which different actors can learn together successfully? How can they do so without inappropriately privileging forms of learning associated with the powerful?

Governance

Governance questions become prominent at the Place scale. The core questions for governance of Learning Cycles are:

- “Is this happening in the way we intend?”
- “How will those undertaking the work of Learning Cycles account for that work?”

At the Place scale, these are questions for bodies such as partnership boards (e.g. Health & Social Care Partnerships), Integrated Care Partnerships/Systems, and Programme Board/Steering Group meetings.



Region/Country Scale

Management

The management of Learning Cycles at the Regional/national scale will likely entail addressing the following types of questions and issues identified by places:

- **Infrastructure issues**, such as information systems. For example, “how do we systemically record and share the experiments that organisations are supporting? What cross-place learning infrastructure is required?”
- **Workforce capability issues**. For example, “how can we ensure that all our organisations have the skills to support the people we serve in order to co-design and run effective action-research experiments?”
- **Resource allocation issues:**
 - How do we commission/fund in order to enable Learning Cycles at the place level to function effectively?
 - What resources are required to build and maintain the relationship infrastructure (the relationship between practitioners and residents)? For example, “how many Community Caseworkers does Gateshead require? How do we ensure that they have the resources to maintain those roles as core public service infrastructure?”
- **Culture issues**. For example, “how do leaders signal a switch to Learning as Management Strategy?”
- **Policy and strategy issues** – “how will the learning from Place scale and below be translated into new policy and strategy?”

People who have responsibility for those functions, across different places, and those with national-scale responsibilities in these areas, will therefore need to be convened in Learning Cycles.

At the national scale, horizontal connections between Learning Cycles are particularly important – how will Learning Cycles from different “purpose” areas connect with one another to prevent “siloesation”?

Governance

Governance questions are significant at the Regional/national scale. The core questions for governance of Learning Cycles are:

- “Is this happening in the way we intend?”
- “How will those undertaking the work of Learning Cycles account for that work?”

At the national scale, these are questions for bodies such as programme boards and in cabinet government.



Region/Country Scale continued

Supporting accountability and governance for learning

Regional/national governments have an important role to play in ensuring that there is a high level of ambition for each place. They can be useful in challenging any parochialism that emerges from inward-looking places, and help create accountability for learning at a Place scale, particularly if there are actors who have been marginalised by previous local-scale power dynamics. Questions to ask include:

- How are places ensuring that all relevant actors are able to learn together?
- How is the governance of learning systems being undertaken? Is learning happening authentically?
- What sort of “ombudsman” role is required at the national level?
- What arrangements exist for whistleblowing? How are whistle-blowers treated?

Appendices

Tools

Appreciative Inquiry

When we think in terms of programmes, interventions, and policies, we often disconnect the work we’re doing from individual and community stories and experiences. Appreciative Inquiry uses questions designed to encourage people to tell stories from their own experience of what works.

This alternative approach to getting at the issue often brings new perspectives and insights.

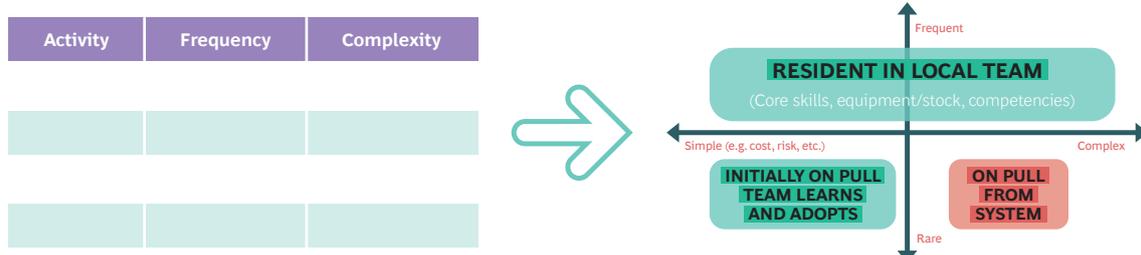
An Appreciative Inquiry exercise can help a group move into a positive, productive space and create a shared vision of what the future could look like. It helps better understand the following:

- a) Context: by identifying how various contextual factors (e.g. social, cultural, economic, political) influence an issue
- b) Connections: encourage creation of new connections, strengthen relationships and build trust
- c) Patterns: break old thought patterns, identify areas of common interest or concern
- d) Perspectives: understand “why” it matters from different perspectives, individual values, and priorities.

A detailed guide on how to undertake Appreciative Inquiry exercises is available [here](#).

Case Files

This issue analysis template, created by Mark Smith at [Gateshead Council](#), helps identify when things were effective and analyses the conditions for success. This included everything from the simplicity of driving a van to the complexity of a medical diagnosis. By adding a judgement around the complexity of each task, they were plotted on a matrix that shows which skills and activities are needed locally in front-facing teams and which should be central to the system and available to all teams when they pull for them. This allows the configuration of teams to be developed “ground up” from work.



Countermeasures

Countermeasures are temporary fixes which shield an exploration/experiment from the normal rules and processes that would apply in Business as Usual. One way of understanding countermeasures is that they are the first step in embedding change. They act as flags to say that some aspects of Business as Usual might not be helpful in the future.

It is important to record the existence of countermeasures – because they need to be removed at the end of the exploration/experiment. Either the exploration showed that the aspect of Business as Usual that was being shielded requires change – likely an experiment at a higher system scale. Or simply that the experiment finished, and so that practice no longer requires protection.

Examples of how countermeasures can be put in place can be found in this case study.

Critical Social Learning System (CSLS)

A CSLS is a collection of individuals who agree to act together as a coherent group of people who are prepared to “collectively learn their way through” an issue they all agree is problematic in some way or another for all of them. The learning occurs in three dimensions concurrently –

- Learning focused on the matter at hand
- Learning focused on the processes of learning, which include:
 - Their impressions on the processes they are using to generate shared knowledge and understanding from their experiences
 - How they are testing the quality or validity of that knowledge
 - How they are designing plans for action in the face of the knowledge they are generating, and decisions they are beginning to formulate in response
 - How they might actually put those plans into action for change
- Learning focused on exploring the nature of the beliefs and values each of them hold, which have relevance to the two other levels of learning. Here they are engaging with each other in examining similarities and differences in the beliefs and values they hold as individuals, which are relevant to the matter at hand.

A more detailed introduction to CSLS can be found [here](#).

Experiment Generator toolkit

The objective of [EDUFI's](#) Innovation Centre Experimentation Programme was to improve the quality of learning by enabling the adoption of an experimentation culture involving actors from different levels of the education system. The Experimentation Programme was an opportunity to be involved in redesigning development practices in education. It supported reflecting on one's work and provided structure and discipline to working towards the next step.

The Experiment Generator worksheet can be found [here](#).

Issue analysis

This issue analysis template, created by Mark Smith at Gateshead Council, helps classify issues at different system scales, and helps identify and document countermeasures and any lasting infrastructure change required.

Issue description	Level			Status (open/ closed)	Owner			Action required	
	1 Ind	2 Sys	3 Macro		Team	L'ship	Govt	Countermeasure (now)	System change (new normal)

- 1: Individual scale: focused on what I/others do
- 2: System scale: focused on how this system works
- 3: Macro scale: focused on how other systems influenced this one.

Learning Pods

Learning Pods is an internal measurement method where psychological safety is critical. This method, inspired by Chris Bolton's [blog post](#) on deploying learning and innovation teams in response to COVID-19, pairs staff who interact directly with residents to reflect on what they have experienced and learned over the past week. Instead of predetermining what they will report on, Learning Pods use a set of open-ended questions so the staff participating can share what has emerged in a dynamic, adaptive way. Questions include:

- What have you done differently this week?
- What did you learn?
- What enabled that learning?
- What has gone wrong?

After reflecting on the questions, staff come together for a group discussion to understand perspectives across different pods. In addition to enabling learning, the pods build empathy as staff are exposed to a wide range of perspectives.

You can learn more about Learning Pods and other similar tools [here](#).

Motivational Interviewing

Motivational Interviewing is an approach to being with people in conversations to support them to make changes in their behaviour. It requires balancing being directive with being supportive and non-judgemental. And importantly, it recognises that people are the experts in their own lives, recognising that it's really important to focus on strengths, what resources people have, the changes that they have been able to make, and issues about their value base and their identity.

The key elements of Motivational Interviewing are:

- Open questions: to explore concerns, promote collaboration, and understand the other person's perspective
- Affirmations: to support strengths, convey respect
- Reflective listening: to explore deeper, convey understanding, deflect discord, elicit change talk
- Summarise: to organise discussion, clarify motivation, provide contrast, focus the session and highlight change needed.

A detailed guide on how to undertake Motivational Interviewing is available [here](#).

Outcomes Star

The Outcomes Stars are a suite of measurement and keywork tools, which drive an “enabling help” approach to service delivery. They support a person-centred, collaborative and trauma-informed approach, and give service users, workers, managers and commissioners vital information about needs and progress.

The Outcomes Star is underpinned by three values – empowerment, collaboration and integration. The values that inform the Outcomes Stars are similar to those of person-centred, strengths-based and co-production approaches:

- The Star places importance on the service user’s perspective and priorities, as in a person-centred approach
- The holistic assessment offered by the Star focuses on aspects of life that are going well, in addition to areas of difficulty, as in a strengths-based approach
- As in co-production, the service user is seen as an active agent in their own life and a valuable source of expertise and knowledge rather than a passive sufferer of an affliction that the professional, with their expertise and knowledge, will cure.

You can read more about the Outcomes Star Framework [here](#).

You can also read about the practical applications of the framework [here](#).

[This guide](#) also provides helpful guidance on running the process.

Quality Management System

The Healthcare Improvement Scotland ihub’s Quality Management System (QMS) is a framework to build a common understanding about what needs to be in place at different levels to ensure effective management of the quality of health and social care.

The QMS framework identifies that any effective approach to Quality Management in health and social care must recognise the vital role that interactions between people (social processes) play including the impact of leadership behaviours and organisational cultures. By increasing the focus on relational approaches to managing quality, it raises the importance of co-designing improvements to services with the individuals who use them and the staff who deliver them. It also recognises that the outcome is often co-produced with the beliefs and actions of the individuals and communities who interact with its services playing a vital role.

You can read more about Healthcare Improvement Scotland ihub’s Quality Management System [here](#).

Relationships Project Kit for Councils

Kit for Councils is a pack for local authorities to support strong community relationships

Mutual aid and widespread community engagement have flourished since the first lockdown. The state doesn't own this new activity, but it can help it to thrive.

The Relationships Project has teamed up with Tony Clements – Strategic Director for Economy at Hammersmith and Fulham Council – to develop a kit to inspire and support councils to create the conditions for relationships to thrive within their communities.

The Kit for Councils can be found [here](#).

Sense-making

Sense-making is about creating space for listening, reflection and the exploration of meaning beyond the usual boundaries, allowing different framings, stories and viewpoints to be shared and collectively explored. The purpose of sense-making is to develop a set of insights with explanatory possibilities rather than a body of knowledge or plan of action. It requires a leap of faith, coupled with an openness to all that can be seen, heard, felt, and intuited. It challenges the notion that one way of thinking can ever be enough to understand the complexities of the world and helps us to break out of narrow or simplistic framings.

In practice, sense-making involves people intentionally coming together for the purpose of using their varied perspectives and cognitive abilities to make sense of an issue or problem they are mutually facing

You can find examples of how we've applied sense-making in practice [here](#).

A detailed guide on how to undertake sense-making is available [here](#).

SenseMaker

SenseMaker® is based on the Cynefin sense-making framework. It is Software as a Service, available through The [Cynefin Company](#), founded by David Snowden. It is a mixed method that supports the collection of first-hand micro-narratives, undertakes statistical analysis and visualisation, and enables shared sense-making that puts the participant in the driver's seat. It has been used for: monitoring and evaluation; impact assessment; and the facilitation of development and social intervention planning across various disciplines and sectors.

Detailed guidance on SenseMaker® can be found [here](#).

Storytelling for Systems Change

Stories of change are typically held in communities and within organisations that are championing a different way of working, but are unable to influence change or collaboration beyond those communities or organisations. Effective storytelling around systems change is about holding multiple truths, tensions and different perspectives; it is about celebrating successes as well as the ways of working that have enabled these initiatives to succeed.

Good stories are created by drawing on many sources of information, including people's voices, evidence and data. It involves exploring narratives that emerge from engaging in deep listening, and then bringing together actors in the system for collective sense-making around the themes that are emerging.

You can read more about our work on storytelling [here](#).

System Mapping (Actors)

To transform the system, we first need to understand the system, and mapping is a great way to do that. A "system," as described by Julia Coffman in her 2007 framework for evaluating system change, is "a group of interacting, interrelated, and interdependent components that form a complex and unified whole". A system's overall purpose or goal is achieved through the actions and interactions of its components.

There are a number of different ways you might approach mapping the system to represent system elements and connections. One example is Actor Maps, which helps identify the following:

- Context and general landscape (key actors, organisations, initiatives)
- Connections (roles, strength of connections, who needs to be involved)
- Patterns (determine where the energy is in the system, and where there are gaps and blockages)
- Perspectives (consider who is, has been, should be involved, how to engage different parts of the system).

A detailed guide on how to undertake building actor maps is available [here](#).

System Mapping (Factors)

Systems Mapping (factors) covers a broad range of tools and techniques, ranging from causal loop diagrams that look at relationships between components, process mapping to understand the journey of people being served through public service, and system effects that help layer personal system maps to build a picture of the wider community experience.

Causal loop diagram

Causal loop diagrams visualise the elements (nodes) of a system and the relationships between them. The relationships between the elements of the system can be either positive or negative. And a number of links can combine to form a loop in a diagram. The causal loop can be either reinforcing or balancing. Reinforcing loops will strengthen the initial assumption and can lead to exponential increases or decreases. Balancing loops will contradict the initial assumption and can lead to a plateau being reached.

A guide to building causal loop diagrams can be found [here](#).

Process mapping

Process mapping offers a “visual aid” to process improvement and provides a means for analysing the process. It is a framework that shows relationships between the activities, people, data and objectives. It can be particularly useful in revealing the reality underpinning policy decisions, particularly when used to map the journey of people being served through public service. This can be particularly useful in highlighting the wastefulness of [failure demand](#).

A guide to process mapping can be found [here](#).

System Effects

System Effects supports the design of effective interventions by giving decision-makers tools to understand patterns that emerge across groups and communities, while at the same time emphasising the varied nature of individual experience. By beginning from the user-understanding of complex systems, the methodology helps to recentre lived experience in social science and policymaking practice.

A detailed introduction to System Effects and how it works can be found [here](#) and [here](#).

Warm Data

Nora Bateson, who coined the term Warm Data, defines it as “transcontextual information about the interrelationships that integrate a complex system”. Warm Data focuses on relational interdependencies including the necessary contradictions, binds, and inconsistencies that occur in interrelational processes over time. As the International Bateson Institute identifies, “Warm Data is the delivery of these multiple descriptions in active comparison, usually in a form that permits and even encourages the subjectivity of the observer within which it is possible to make meta connections”.

You can learn more about how it can be applied in practice [here](#) and [here](#).

HUMAN
LEARNING SYSTEMS



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