Designed for Ageing. Design Stage Gate – Draft Process Guide for Successful Projects

The purpose of this guide is to describe how the design stage gate (DSG) mechanism will be applied to successful projects and the timeline of key DSG activities. The guide will illustrate the design stage gate criteria you will need to pass, how these are scored and how we will support you with this process. If you have any queries about this guide, please address these to the Design Innovation Lead for Designed for Ageing.
The Design Stage Gate panel will comprise both UKRI and external design experts. The panel has the responsibility to review the written evidence submitted by **successful awardees from lead organisations** including the completed stage gate questionnaire, updated business plan, commercialisation plan and stage gate interview presentation. As per the timeline in Section 1 of this guide, the questionnaire will be issued in May 2022, so there is good time to align your design activities.

The panel will assign a **PASS, CONDITIONAL PASS or FAIL** status following the November 2022 assessment.

The stage gate interview will initially comprise your ten-minute presentation. You may bring up to five people in total from your project to this presentation. After your presentation the panel will spend 30 minutes asking questions.

1.   Design Stage Gate: Timeline Activity View – 2022

This timeline table describes the sequence of events which support the design stage gate (DSG) review. At any point in the timeline, information from your project relating to the design stage gate may be shared with the design stage gate panel.

Timeline 2022	Activity
May	- Awards made by 01 May 2022. - Named contact(s) from your lead organisation to be supplied for the design stage gate review process - these could be the Monitoring Officer's point of contact too. - DSG introduction as part of project start-up meetings with awardees, Monitoring Officer and Innovation Lead. - You will be given the Design Stage Gate Questionnaire which will be used for November review.
June	Innovation Lead commences monthly check-in calls to review project progress.
July	- Innovation Lead monthly check-in, in preparation for Design Stage Gate review in November. - End July Monitoring Officer quarterly review.
August	Innovation Lead monthly check-in, in preparation for Design Stage Gate review in November
September	- Date for interviews in November confirmed within the prescribed period for your formal Design Stage Gate review. - We will send a reminder for the 01 November submission date for your completed stage gate questionnaire, business plan, commercialisation plan and stage gate interview ten-minute presentation
October	- Innovation Lead monthly check-in, in preparation for Design Stage Gate review in November. - Opportunity for you to resolve any last-minute queries re your questionnaire. - End October Monitoring Officer quarterly review.
November	01 November deadline for submission of stage gate questionnaire, business plan, commercialisation plan and stage gate interview ten-minute presentation. 07- 18 November – likely Design Stage Gate interview panels. - Week commencing 28 November, all projects are formally informed of design stage gate interview outcome, including any conditions for continued funding.
December	- Termination and/or Amendment letters are sent by UKRI as appropriate. - Failed projects can make no claims beyond 01 December and will receive no further funding. - An appeals process is available to failed projects. Details are provided in the Grant Offer Letter (GOL)

2.   The Design Stage Gate Questionnaire

The Design Stage Gate Questionnaire comprises five dimensions which are assessed as shown. Each dimension contains up to two assessment criteria. The response to each criterion (except the business plan and commercialisation plan) must be a maximum of 400 words and presented in Arial font (Size 11). The business plan and commercialisation plan must be a maximum of 3 pages each presented in Arial font (size 11).   Each criterion will be assessed and scored out of a maximum of 10. An individual score of 5 or less may give rise to a conditional pass or a fail. Each gate dimension can have a maximum score of 20. We represent the total score as a percentage, and 70% is the quality threshold.

2.1 Evidence of User Engagement

(How have you engaged with your users and how have you recorded and applied the user feedback to better develop your service)

   a.   Provide details of the user groups you have worked with on this project. Provide evidence of user group diversity and regularity of contact.
   b.   Describe the user feedback analysis methodology you deploy on this project. How did it drive your design decision to inform your solution's functionality and attributes?

2.2 Evidence of People Centred Design

(What adaptations have you made to improve your service as informed by engaging with your users? Have any new risks been identified by making these adaptations? If no change was needed, please explain how this is based on your users' feedback)

   a.   Provide details of adaptations you have made to your service through deploying people-centred design. If you have made no adaptations as a result of deployment, explain why.
   b.   Provide details of any new or changed risks identified as a result of making or not making these adaptations. A risk register or risk table should be included.

2.3 Evidence of Take Up & Acceptance Within Practice Community

(How have your users benefitted from your service implementation and adoption? Describe how this supports future demand for the service)

   a.   Provide evidence that your user group have experienced some early indications of healthy ageing benefits following their use of your solutions.
   b.   Provide evidence which supports the anticipated demand for your service specifically within your user group.

2.4 Augmented Proof of Market

(Describe how the demand for your service has increased beyond your user group. Are new stakeholders interested? Do you think you have further evidence to support your initial claims that your solution is scalable?)

   a.   Can you evidence that your anticipated market size and share is credible? Explain how this is justified based on your user group feedback.
   b.   Can you evidence that your solution is scalable through new partnerships and customer engagements? Have others become interested in your offering since the 'user group' was established?

2.5 Updated Business and Commercialisation Plan

(Please provide an updated business plan and commercialisation plan (the latter should include, for example, formal partnership arrangements or contracts) to demonstrate how that they have been updated to reflect learning arising from the people-centred design activities you have undertaken).

   a. Provide evidence that your business plan has been updated to reflect a fair view of your market position with respect to the people centred-design activities you have undertaken.
   b. Provide evidence that your commercialisation plans have been updated to reflect a fair view with respect to the people-centred design activities you have undertaken.

Section 3: Design Stage Gate Questionnaire Score Matrix and Outcome

We will use this score sheet to hold your aggregated score from the individual design gate scores above and this will show us whether you have passed or failed. **Scores for each gate criteria are out of 10. The total maximum score across the 5 stage gates is 100**

CATEGORY ONE PASS	Score >70
Funding Continues	Stage gate criteria met well. Business plan and commercialisation plans updated to reflect progress and learning from the Design Stage Gate. You can continue to claim your funding in the usual way.
CATEGORY 2 CONDITIONAL PASS	**Score >60**
Amendment Letter with Conditions for GOL. Funding continues basis that you will meet these conditions.	Funding continues in the usual way provided criteria are met
Individually tailored per entrant	You will be expected to work closely with the Design Innovation Lead to demonstrate you are on track to achieve a full pass and we will continue MO/monthly meetings with the Innovation Lead.
CATEGORY 3 FAIL	**Score <60**
Funding Stopped	No more claims can be made against your project. Funding is discontinued. Last legitimate claim can only relate to November 2022. We will send out a letter to confirm withdrawal of funding.

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