Explaining the difference your project makes

A BIG guide to using an outcomes approach

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BIG LOTTERY FUND

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We have used and adapted the CES Planning Triangle by kind permission of Charities Evaluation Services.

Introduction

You are probably reading this guide because you have a project or an idea for a project that you would like the Big Lottery Fund (BIG) to support.

Like other funders, BIG is an outcomes funder, so it is important for you to know what we mean by that and how this will affect you as an applicant or grant-holder. This guide aims to help you do that, and covers the following aspects:

- identifying, understanding and explaining the need you want to meet
- being clear about your overall aim and the details of how your project will meet the need measuring your success
- learning from what you have achieved to improve your project throughout its life.

This guide sets out some of the main steps that you will have to take to plan and manage a project using an outcomes approach. This guide is also available on our website. We hope that the guide will be useful for a wide range of applicants, but it is primarily aimed at those who are new to the outcomes approach and want to find out more. For this reason we provide further information about some of the issues raised, more examples and sources of further support on our website.

What is an outcome?

Outcomes are the changes or difference that your project can make over time. An easy way to think of them is that they are the result of what you do, rather than the activities or services you provide.

For **people**, this might be things like improved health, new skills, more confidence or self-esteem, or getting a job. Some projects focus more on **communities**, the **environment**, or **organisations**. The outcomes might relate directly to them (such as tidier communities or more biodiversity) or changes in people that help benefit them (such as more awareness of environmental issues, reduced fear of crime, or more community participation).

What is an outcomes funder?

An outcomes funder like BIG is clear about the wider changes that it wants its funding to make overall. You can read about these outcomes on our website. Our programmes will normally have more specific outcomes, too. To get funding from a programme, you will need to show that your project will help us to achieve one or more of these.

This means that we ask you to explain in your application just what difference your project is trying to make by setting out your own intended outcomes. And if we give you a grant, we will ask you to report on how far you are meeting the outcomes that we have agreed with you.

Throughout this guide, you will see information in boxes like the following. This explains particular approaches to outcomes and grant-making that we use at BIG. Other funders may manage an outcomes approach slightly differently.

BIG asks you to be clear about the outcomes that your project intends to achieve. What you say is an important part of how we decide which projects to fund, and how we manage our relationship with you while you have a grant from us.

You should always refer to guidance for specific programmes if you wish to apply to BIG or other funders. There may sometimes be variations and this guide cannot take account of them all. But we will almost always ask you to develop SMART outcomes and SMART milestones to support them. If you are in any doubt, please contact us for advice.

Details of all our programmes are available at www.biglotteryfund.org.uk

1. Planning your project: understanding the need

You probably already have a good idea about why you want fund ing. You may be aware of problems or unmet needs from your own experience, through research or through being involved with an organisation or group. The first step in taking an outcomes approach is to write a brief summary of the main need (or problem or issue) that your project wants to address. What needs to change?

Be as realistic and specific as possible. There may be many needs, so stick to the main one that you want to work on. You may not be entirely sure or clear at this stage, but working through this guide will help you to get a clearer idea, and you can always revise your summary as time goes on. On the other hand, you may be very sure about what the need is. Even so, it is very important to have a clear statement about this. This helps to ensure that other people involved in your project share an understanding, but also so that funders understand what you are trying to do.

Examples of overall need

The following are expressed in terms of what needs to change:

- families with autistic children are isolated and struggling to cope
- lots of litter around the estate
- many local young people are involved in anti-social behaviour
- lack of skilled committee members in small community organisations.

1.1 Evidence of need

How do you know the need exists? You will have to provide some evidence. This can come from a combination of sources, such as:

- asking people with experience of the need
- your own experience, or what you have seen
- research into the scale of the need
- local statistics about the population in the area or levels of deprivation (such as from the census or other more recent surveys) or other statistics.

You will almost certainly have to spend some time researching need. In general, the time you spend will be in proportion to the size of your project. In this guide we focus on small, community-based projects. For larger organisations and projects, we are likely to want to know more about local, regional or national strategies and how your project fits with them and the evidence that they have gathered. More information about sources is available in the "Investigating and writing about need" factsheet on the website and in programme guidance.

Example: Evidence of needs experienced by families with autistic children
There are 48 families with autistic children recorded in the area your project covers. You have chosen eight of the parents at random and have asked them about their experiences. Of the eight, six (75 per cent) said that they were struggling to cope and felt isolated. This suggests that about 36 families in the area have those needs. The parents also said that the main reasons were lack of contact with other families with autistic children and lack of places to go with their children.

Note on consultation:
People who come forward to offer their views may not be representative of the majority. If you invite people to attend a consultation event, distribute a questionnaire and ask people to return it, or ask people you know for their views, there is a strong chance that this can happen. Other people may have relevant views but may not have the opportunity to respond. So you should make sure you hear from people who can represent the whole range of beneficiaries. There are various ways that you can do this; the "Using questionnaires and surveys" factsheet on our website will give you some more ideas and sources.

1.2 Understanding the reasons for the need

There may be a number of possible causes for the need you intend to address. Again, it is important to state which needs you will address and which you will not. It is also worth having clear reasons why.

The table below gives some examples of problems, reasons and possible solutions.

Overall problem	Understanding of the reason for the problem	Possible solution (project)
Too much litter on the estate	Litter bins are too few and too small	More, bigger litter bins
	People are throwing away too much rubbish	Recycling project within the community
Young people involved in anti-social behaviour	They have nowhere to go and nothing to do	Set up a youth club or run activities
	Their parents are unable to cope with them	Parenting support project
Lack of skilled management committee (MC) members in small community organisations	Community organisations do not know what skills are needed and how more skills might benefit them	Skills audit
	Existing MC members do not have skills in required areas	Training for MC members
	Difficulty recruiting skilled MC members	Recruitment drive

Exercise:
Get together with other people involved with your project. Write down the need that you have identified, and get everyone to come up with possible answers to the following question:

- What is the need? What is the evidence for it? What is causing it?

Then decide as a group what the main reason(s) is/are. This is likely to be the need that your project plans to address.

Now look at the other reasons. Why are they not relevant or as important? Are there other reasons why you do not plan to address them? Perhaps someone else is dealing with them, and your project will complement what they are doing.

This should help you and others to get a clearer idea about the purpose of your project and what it will and will not do.

Find out if any other projects or services are addressing similar needs or working with the same beneficiaries in your area. You will need this information if funders or others ask how your project will fill gaps or add to existing projects. Thinking about and talking to other projects may also help you to find evidence about what is needed and which approaches are likely to work. In particular, similar projects to yours that are already working elsewhere can give you a lot of good advice.

Examples:

- We considered possible reasons for the litter problem (list reasons) and decided to set up a community recycling project on the grounds that the main reason was that people were throwing away too much rubbish.
- There are a number of reasons for young people's anti-social behaviour. (List the reasons.) There is already a local project working with parents, so we have chosen to set up a youth club.

Examples of evidence of how you know your approach is needed and will be used by your beneficiaries could include:

- experience of other similar projects
- the findings of research
- findings from a consultation exercise that asks people who have the need what they think would help.

BIG will ask you in your application about:

- the need that your project is trying to meet, and evidence that you have about the need
- the types of people who will benefit from your project and evidence you have about their need, as well as the level of that need – you may have to show that you are targeting the people who are most in need
- why you think your project is the best approach to meeting the need.

Once you understand the need you want to address, you can work on being clear about the difference that you want to make, and then how you are going to do it.

2. Being clear about your aim and outcomes

There are three parts to the difference you want to make:

- your overall aim – the overall purpose of your project
- your intended outcomes – the specific things you want to have changed by the end of the project
- your tasks or activities – what you will do to make that difference.

A helpful way of thinking about these and setting them out is to use the CES Planning Triangle. It can help you to discuss and record what you want to change and how you will do it, and then let you test how realistic your plans are. A general model of the triangle and a completed example appear on the next two pages. Note that the three levels of the triangle match the three levels set out above.

This is how you can go about filling in the different levels:

1. Put your overall aim at the top of the triangle

The overall aim sums up the difference that you want to make. It helps focus everything that you do. Your aim should clearly set out what the need or problem is, and what difference you want to make overall. The needs and reasons that you identified in the previous section should help you to do this.

Choose a simple aim and word it carefully. It should be something that you can achieve or at least influence strongly over the course of your project.

Remember that your aim is also the summary of how you will explain why your project exists – and why it should be funded.

When applying to BIG, include your aim in your project summary.

2. Put your intended outcomes into the middle level of the triangle

What needs to change for your project to achieve its overall aim? What differences will your project help to make for your beneficiaries? The answers to these questions are your intended project outcomes. Some of these outcomes might happen quickly, while others may take longer and depend on meeting other outcomes – but they must be changes that will happen by the end of your project.

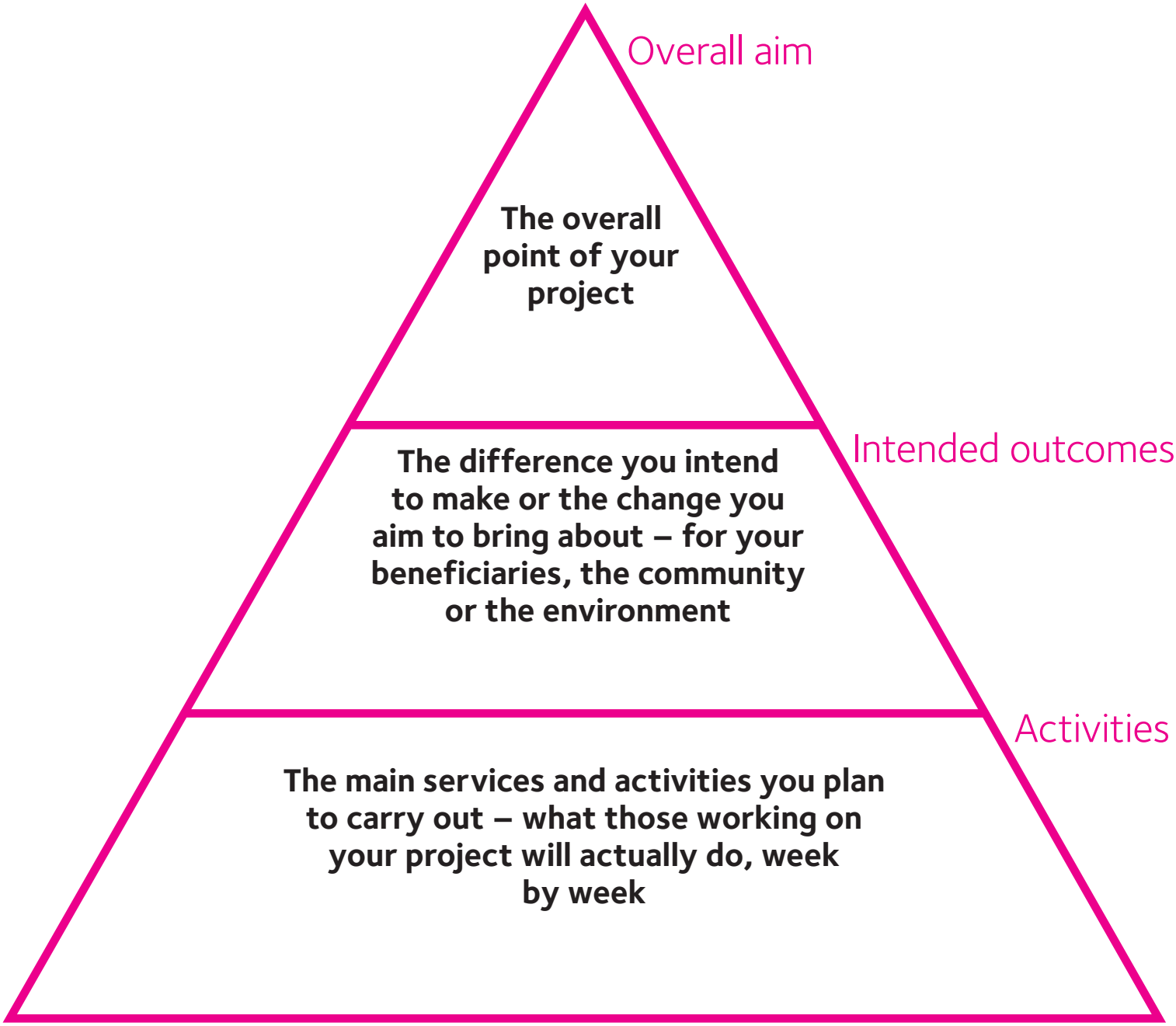
Be sure to use words of change when describing your intended outcomes, such as: more, better, less, improved. In some cases, though, your outcomes may involve keeping a situation stable or stopping things from getting worse.

You should also make sure that your intended outcomes refer to changes that are not simply related to the workings of your project – for instance, instead of saying "young people contribute to decisions about running the project", say "young people are more confident and able to express their opinions".

Remember not to come up with too many or too detailed intended outcomes. Think of grouping them together or pick out the most important ones. Please also note that later you will need to think about how much of a change you want to make and to identify ways of measuring progress. For the moment, though, it is more useful to think about the type of change.

It can be hard to think in terms of intended outcomes. If this happens, start by looking at what activities you intend to do and ask yourself why. (What changes will those activities lead to?)

CES Planning Triangle (adapted)



A completed triangle for a youth project

BIG will ask you to identify up to six outcomes as part of your application. We will not usually tell you what they should be, because we want you to tell us how and why you will run your project. Please remember, though, that you will also need to explain how your intended project outcomes fit with our own programme outcomes. You will also have to tell us about the level of change you want to make – see "How much? Setting SMART outcomes" in section 2.1.

3. Set out what you are going to DO in the bottom layer of the triangle

What you are going to do in order to bring about your intended outcomes and address the need? These are tasks, services or activities. Examples include:

- running groups, courses or classes
- producing and distributing information
- building a community centre.

Example: Community recycling project activities:

- community events to raise local awareness
- talks at the community centre
- setting up easy collection points.

Make sure you use words of action to describe what you will do, such as: to provide, to run, to organise, to produce or to promote.

When applying to BIG:

- list and explain the main activities of your project – this may be called "delivery method"
- mention the main activities as part of your project summary if they help to make it clear what your project aims to do and how it will do it.

When you have filled in a triangle, check the following:

- Have you used words of change in the top and middle and doing words in the bottom of the triangle?
- Does the middle of the triangle describe what changes for your beneficiaries (or for organisations, the community or environment)?
- Does the bottom of the triangle describe what staff or volunteers will do?

Now you can look at the triangle as a whole to check that the plans for your project are realistic:

- Look at each of your intended outcomes in the middle level. Will the activities you have listed at the bottom realistically help you to achieve one or more of your intended outcomes?
- Now look at the activities. Does each one link directly to one or more of the intended outcomes? If not, why is the activity included? You may need to consider whether the activity really is important. It may well be that the activity will help you to achieve another change. If this is the case you may need to include another outcome. It may help to do this if you number the outcomes and put the number(s) against each activity.

2.1 How much? Setting SMART outcomes

If you have used a triangle as described above, you will now have a good idea about why you want to run your project, what difference you want to make and how you will get there.

But you will also have to think about the scale of your project – how much of a change, for how many people, and when you will have achieved what. This will help you to plan your project further, and it will also help you to explain to funders just how much you think you will be able to achieve.

When BIG or other funders consider your application, we need to work out quickly and clearly what changes you want to make and how and by when you will do this. To help us to do this, we ask you to make your outcomes SMART – that is, specific, measurable, achievable, realistic and time-based. What this means is that your intended project outcomes will need to include such information as dates and numbers, as well as what and who.

SMART outcomes might look like the following:

- 100 young people in Dungannon understand political processes better by the end of the second year.
- 200 more households on the Cullingworth Estate are regularly recycling at the end of the project.
- 15 local groups who have taken part in the project report more success in attracting funding by the end of the second year.
- 25 local families with autistic children report reduced stress as a result of respite opportunities (end of second year).

It may be very difficult to estimate numbers you should aim for, especially if you are starting a new and innovative project and trying to be clear about outcomes. Try to be as realistic as possible and base numbers on any information you have, such as:

- your experience or that of similar projects
- your capacity (time, people, money and other resources) or
- the scale of the need you want to meet.

It can be tempting to set high figures when you are applying for funding. You may want to impress funders with the scale of your project. But you have to remember that funders will ask you how far you have progressed towards meeting outcomes as time goes along. If you cannot meet them, you may find your project working beyond its capacity, reducing quality and disappointing people who were keen to be involved or to benefit.

It is always best to be realistic and honest with both funders and other people involved in your project.

BIG is very concerned that applicants should be realistic in project planning. This should not stop you from being ambitious when you plan and set out SMART outcomes as part of your application. Our staff may be able to discuss this with you during your assessment. But if you are unsure about what levels to suggest, try to find out more before you submit your application, because we will use the information you include as part of any grant contract.

2.2 Linking your intended outcomes to your funder's programme

You should make sure that your potential funder will understand how your intended outcomes will help contribute towards their own priorities or outcomes. If you are not sure that they do, speak to the funder before you submit your application. They may be able to give you further advice, including whether it is worth applying to a particular programme.

Example: Linking project outcomes to programme outcomes

A project aims to involve more families in a recycling scheme. The funder's programme outcomes include:

- improved local environments accessible to all and relevant to people's needs
- a greater sense of community ownership of the local environment
- improved social, economic and environmental sustainability.

The project will help meet the first by reducing the amount of litter in the area, the second by increasing local awareness and involving residents in running project activities, and the third by increasing the levels of recycling in the area.

You will need to describe how your intended outcomes address the needs you have identified and help to achieve BIG programme outcomes. Programme outcomes appear in the relevant guidance notes. Remember that we do not expect you to write your own outcomes directly in response to ours, but we are interested in how you think your project as a whole will help us to achieve our programme outcomes.

3. Measuring progress

You measure the progress of your project in two ways:

- by measuring the progress of your activities
- by measuring your progress towards achieving your intended outcomes.

Different funders may ask you to describe these in different ways. When you apply to BIG, the different levels or targets you set out will all be called "milestones", and they should all be SMART. We will ask you to report on them regularly.

3.1 Progress of your activities

This is usually easier to think about, because much of it is simply about deciding and recording the main tasks that you will undertake, and when these will be completed.

There are some tasks or services that you will offer throughout your project, and it is useful to have an idea of how many you will have offered by what stage.

We call these stages or target levels "milestones", or more precisely, "activity milestones". Milestones help link the main events of your project to a wider timetable.

Because milestones let you measure your progress against your plans, it is essential for you to make sure that they are SMART.

SMART milestones for achieving tasks could include the following:

- project co-ordinator in place (31 January)
- publicity produced and distributed (15 May)
- premises ready (31 May)
- work started with beneficiaries (10 June).

SMART milestones for the level of services you will have offered could include the following:

- 250 young people in Dungannon have attended discussion meetings (end of first year).
- 16 community recycling events held by 30 September.
- 30 young people regularly attend the estate youth club (end of second year).

Please note that you may also have to set some milestones that relate more directly to progress towards outcomes. See section 3.2 and the "Worked examples" factsheet on our website for more details.

In general the milestones you set will begin with some of the first type above and then move to a mix of the second type and any relating to outcome indicators.

BIG will ask you to set milestones for each of your intended outcomes as part of your application. We will ask you to report regularly on your progress in meeting these.

3.2 Progress towards your outcomes

The types of milestones discussed in the last section are directly about getting particular tasks done and delivering levels of services.

But outcomes funding links doing that to making a change for beneficiaries or the wider environment. So it is very important to think about how you will know that you are making those changes. The measures that you use to do this are called outcome indicators, because they help to measure how far you are moving towards achieving the overall outcome, perhaps by recording how many people have reached the outcome so far, or how many have reached earlier stages.

The questions that you should think about to help develop your measurements include the following:

- How would you know this change had happened?
- How would you know there was progress towards your outcome?

By setting milestones and levels for each of your outcomes, you are likely to have considered some of this. But for many aspects of the outcome, you will have to measure changes for your beneficiaries or the environment. This is not simply about reporting on your activities, but about things like changes in attitude or behaviour or, for instance, a measurable reduction in the amount of litter or an increase in the number and range of plants and animals in a new nature reserve. Sometimes you can ask people about the changes, and sometimes you may need to rely on observations.

Exercise: Listing your outcome indicators

If possible, work with staff, volunteers and beneficiaries. List each of your outcomes. Get everyone to consider and discuss answers to the questions above. Do you agree on your answers? How can you measure the indicators? Remember that some of the evidence of need that you gathered earlier may also offer ways of doing things.

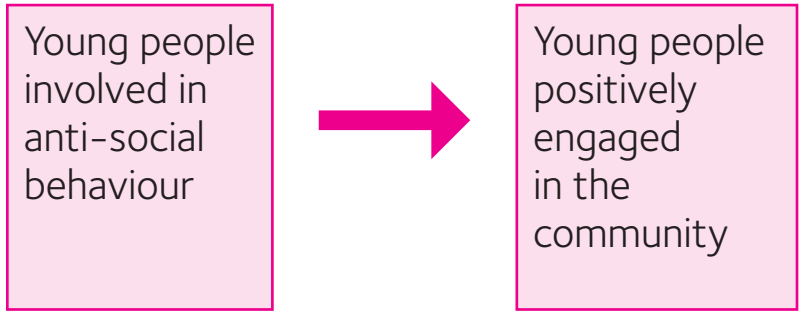
One way of thinking about changes for people is to imagine one of your beneficiaries walking through your door for the first time and then walking out again after a week, month or year:

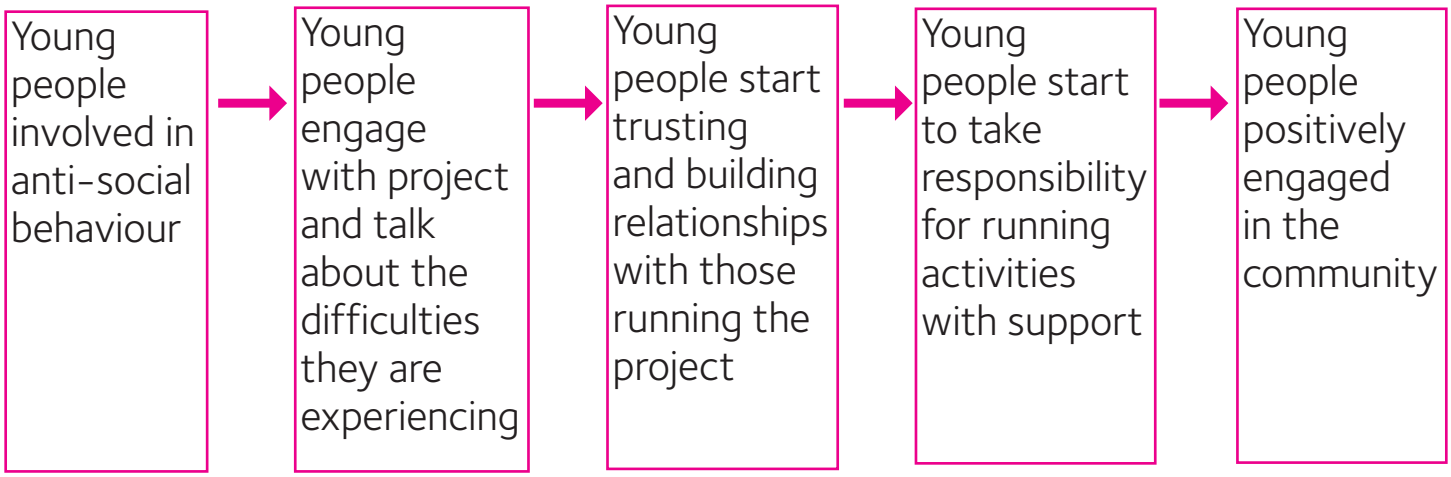
- What are they doing when they first come in? What might they be saying? How do they engage (or not) with the project? How do you know they have needs?
- How would you answer those questions at the end of their involvement with your project? What will be different for them by the end, in terms of their skills, attitude or knowledge?

There may be a number of steps or a journey for beneficiaries while they are with your project. If that is the case, you can use the approach above to identify and fill in the steps on the journey, describing how you know that beneficiaries have moved through a stage.

Exercise: From starting need to intended outcome
For example: Write the current situation on the left of a large sheet of paper and the outcome you want to achieve on the right. Work with others to fill in the journey.

Example: steps along the way:





You could set milestones to explain how many young people you expect will have reached which stage by which point in the life of your project. For instance:

- 75 young people have discussed their difficulties with the project (six months).
- 60 young people report that they trust the project workers (nine months).
- 30 young people are taking responsibility for running the project (one year).

More examples of outcome indicators:

Outcome	Outcome indicators
Committee members develop skills in the required areas	● managers of small community organisations report number of committee members who have completed training ● records at training courses show attendance by committee members ● partner and funding organisations report level of confidence and skill in relevant areas by those trained.
Families with autistic children feel supported and able to cope	● parents say whether they feel more or less isolated ● level of contact parents have with other families ● number of families attending activities organised by the project.
More households are recycling	● number of households that are recycling ● how far the amount of recycled material has increased or decreased.
Young people positively engaged in the community	● levels of reported crime and anti-social behaviour involving young people ● project workers' views on how far young people engage with them and open up in conversation ● level and type of participants' engagement in this and other community activity.

Try to gather information on outcomes from more than one source, such as:

- what the beneficiaries of the project say
- what they now do differently and
- what staff and volunteers observe.

This helps make your information more reliable because it balances different points of view.

BIG will not normally ask you to identify outcome indicators separately, but only as part of the milestones you include for your project outcomes. Remember that like all milestones, they help to measure progress towards achieving your project outcomes and so it will often be useful to include some of this type of milestone.

3.3 Using questionnaires to measure change

To measure change in a consistent way, you will usually have to use a standard form with questions that relate to your outcomes. This may be a questionnaire or another type of monitoring form.

If you work with individuals in a small project, you will generally collect information when you begin work with each beneficiary, again at regular intervals (such as every three to six months), and when they "leave" the project. You should also take account of how often and how far your funder will want you to report on your progress. If, for instance, you need to report every year, you will probably want to collect information shortly before you need to put information together for your funder.

Whichever method you choose, comparing the information from the first and most recent forms will give you information about the extent of the change – the outcome – that has come about. There is more information about doing this in section 4.

Designing and analysing questionnaires and monitoring forms – and getting people to fill them – is often more difficult than it might seem. In this guide we can only give you some general information. There is more detail and information about other sources of help available in the "Using questionnaires and surveys" factsheet on our website.

Here are some general things to think about when designing forms of this sort:

- Always start by deciding what information you need to collect. Avoid the temptation to collect other things that you will not definitely use. The more you include, the less likely people will be to complete the questionnaire.
- Think about how you are going to analyse the information. This might lead you to ask questions in a different way. For instance, yes/no questions may not tell you why something has happened, but they are a lot easier to add up and report than reading individual comments. Using spreadsheets on a computer can save a lot of effort and allow you to analyse information in different ways.
- Yes/no questions are useful, but offering people a scale (such as 1 to 5) can offer more detailed information. This may be particularly useful when changes occur over time or through steps.
- There are various ways of asking more sensitive questions. For instance, instead of asking "How often can you not cope?" you could say "Many people in this situation say that they often can't cope. How often do you feel this way?" and then offer "Most of the time/often/sometimes/never". Just making small changes like this can encourage more people to answer more honestly.
- Many projects will find useful forms on the internet or through contact with other, similar projects. Unless you are running a project with the same outcomes and types of target, you will have to adapt these to meet your needs.
- When you have designed a questionnaire, test it with people who will actually use it. This will help you to identify and improve questions that are not clear. You will also find out whether the questionnaire is too long. Remember that changing

a questionnaire part of the way through your project may make it impossible to compare information collected at different times.

- If you work with large groups of beneficiaries, you may want to consider collecting information from a sample rather than from all. But try to make sure that the sample represents the whole range of beneficiaries.
- Remember to respect people's confidentiality and not to question their responses.

3.4 Some other ways of measuring change

The previous section set out one of the more obvious approaches to measuring change – using a questionnaire to ask beneficiaries about their own experiences. But in many projects, and particularly those that benefit the environment, you will have to consider other ways of gathering information, simply because there are no direct beneficiaries.

You can often use questionnaires with staff and volunteers to get their views about what you are measuring. Or you can ask members of the public about their impressions of the situation at the beginning and what has changed. One example might be asking local residents how much litter they felt there was in the area – you could ask this at the beginning, and you could ask it again after your project had been in place and tried to tackle the problem. And as well as residents, you could think of others who might have an opinion – caretakers and street-sweepers would probably have something to say.

But you can also ask staff and volunteers to collect more general information in the course of their work, and to do so at different points in time. Some examples of what and how you might collect this appear below.

Example: Community recycling

- number of people at each event held
- whether recycling points are kept tidy and are well-used.

Example: Young people

- incidents of anti-social behaviour or conflict at the youth club
- how far young people are engaging with workers
- whether and how far young people are actively taking more responsibility.

You may also want to use other information that you record when running your project, such as registers of people attending training or events. Remember, though, that some information, like numbers attending events, is not direct evidence that you are reaching your outcome. But it can help you to report on milestones and progress towards your outcome.

In some cases it may be difficult to work out how to measure outcomes at all. If so, consider how far your proposed outcomes can be achieved in the lifetime of your project. For some projects, such as helping people to eat more healthily, the real benefits – such as reduced heart disease and other types of illness – may only emerge in years or decades to come. In this case, it will be more realistic and practical to measure changes in things like knowledge, attitudes and behaviour – steps along the way. For more information about setting outcomes and measures in situations like these, please see the "Worked examples" factsheet on our website.

Unless we say otherwise in our programme guidance, BIG will ask you to set programme outcomes and milestones that you can achieve and report on by the end of our funding. This means that you will almost certainly only be able to tell us about interim outcomes in cases like long-term improvements to health. In some programmes, we may only fund the first part of your project, and we may ask you to report about outcomes after our funding ends. This might apply, for instance, if our programme sets out to fund building work, but providing the building will enable you to run a range of community activities afterwards.

Finally, remember that you had to identify evidence at an early stage of planning your project. This may give you further ideas. If someone else regularly collects statistics, you might like to look at them again (but remember that other factors might affect these figures). Or if you surveyed potential local beneficiaries, you could survey them again.

3.5 Tips for tracking your outcomes

Many people complain that collecting information gets in the way of running projects. It does require time and effort, but remember that you are doing this to report on what your project is achieving, and to help you to consider how effective it is, and whether it could do better if you made some changes. Here are some further tips (and there are more on our website):

- Very often the types of information that you will collect for outcome monitoring will be things that you need to collect anyway in order to run your project. So build outcome tracking into the work that your project does as a whole.
- Involve beneficiaries at all stages – as well as filling in questionnaires themselves, they can help to identify outcomes and outcome indicators, test new forms, and encourage others to complete them. Your project is likely to be more effective if it gives the people it sets out to help a genuine say in what you do.
- Be creative. You do not need to use the limited examples we give here. Many projects have used drawing, role-play or other methods to gather information. Think about your beneficiaries and what is most meaningful to them.
- Remember that other people and organisations can help you. There is a "Sources of support" factsheet on our website to give you some ideas.

BIG asks about your plans for monitoring progress as part of your application. This means that you will have to:

- explain in your application how you will collect information
- report on how far you are meeting your milestones and outcomes at regular intervals, usually every year
- tell us about any problems you have in meeting your outcomes, and if necessary work with us to overcome them or revise your plans.

4. Learning from your outcomes

4.1 How to analyse your outcome information

If you gather outcomes information using the types of questions illustrated in section 3 and add up the findings, you will be able to calculate numbers achieving different outcomes in your project, such as:

- 54 young people started taking more responsibility.
- 26 parents said they felt less isolated.
- 35 households families started recycling for the first time.

You could also work out the percentages achieving each outcome. For example, of 72 people at the youth club, 75 per cent started taking more responsibility.

You will also find out the proportion of beneficiaries who stayed the same or had negative outcomes. Remember that staying the same can be a very positive outcome for some beneficiaries and situations.

If you have used questions with scales, you can also work out:

- the average start point, which is also evidence of need
- the average end point, which is what was achieved
- the average amount of change (outcome), which is the difference between the figures above.

Exactly what this information will look like and how much detail you have will depend on the monitoring you have done. You can get a lot of useful outcomes information from a few scales or questions. You will have individual information, but by adding up all responses to each question and averaging them, you will sometimes have an overall summary. Remember, though, that that will not always be the case, so you have to think about and test the approaches before you start using them.

Here is an example of what could come out of a simple questionnaire used twice:

Example: Of 150 management committee (MC) members who attended training:

- 120 increased their knowledge of their role as a MC member (80 per cent).
- 102 increased their knowledge of fundraising (68 per cent).
- 69 increased knowledge of strategic planning (46 per cent).

Outcome	Average start score	Average end score	Change (outcome)
Understand role of MC member	1.3	4.5	3.2
Understand strategic planning	3.1	4.1	1.0
Understand fundraising	2.1	3.9	1.8

You could also calculate outcome information across different types of beneficiary as long as you have collected relevant information on the questionnaire about individuals. So you might be able to answer such questions as:

- Do young people under 15 achieve better outcomes than those over 15?
- Do men have a higher level of starting need than women?

4.2 Learning from the numbers

There are two main uses for the information you have collected and analysed. One is to report to your funders about progress towards achieving your outcomes. The other is for you and your project to consider and learn from your findings. Doing this is called self-evaluation. This is an activity that allows you to think about how you can improve your project to get even better results.

The further examples on the website show some of the information and trends you can identify from analysing information, and some conclusions and further questions that they can lead to.

BIG will ask to report on progress with your intended outcomes, but we also encourage you to undertake self-evaluation for your own benefit. You can do this as set out in this guide, or you can employ an outside evaluator to help you to do that (and to support the way that you gather information to report on your outcomes to us). We believe that self-evaluation and learning from the findings help projects and organisations to develop and improve, and so we are happy to consider funding the cost of doing this.

The good news is that there is likely to be a big overlap between the information that you collect to report to us and what you need for self-evaluation, although you may want to collect more information for self-evaluation.

The guidance notes for each of our programmes will tell you whether we have any specific requirements or support for self-evaluation in place for you.

Although funders will not necessarily want to see the results of your self-evaluation, you may be able to use those findings if you need to explain why progress is not as good as expected. This is another reason why it is worth considering what you need to report to your funder and how to make that part of a wider self-evaluation that will also allow you to manage and review your performance for your own needs.

This raises an important point – much of what you gather and report is based on figures, so while it can measure progress, it will not explain why your project has performed well or not so well. So it is essential to look beyond figures (and particularly unexpected ones) so that you can try to understand what has happened. This will also help you to focus more on doing more of what works and improving or doing less of what does not.

If there are concerns about how you are doing, it is always worth discussing these with your funder – and preferably before you have to report them. It is best to show that you have considered any problems, why they have arisen, and what you can do about them. Sometimes there will be external factors that you could not have predicted and that are outside your control. Or you may find that some aspects of your work are proving unexpectedly more popular and successful than others. Funders will normally want to work with you to deal with the unexpected and may be happy to negotiate changes to agreed levels of outcome and milestones.

Some further tips on reporting

- In many cases, and particularly if you are using statistics that come from outside your project, it may not be clear how far your project has caused those changes and how far other factors have. If possible, make sure that you have some measures in place that relate just to your project. It is quite likely that you have helped to achieve wider changes, but do not make claims that are too grand.
- External factors and changes may help or hinder your project's performance – or just the reliability of your outcomes and measures. For instance, a new government programme might change the whole basis of need and the range of services available. Work with your funder to review your plans if this happens.
- Sometimes you will have worked with other organisations to achieve outcomes. If you can, report on this to funders and give evidence about how working together has led to stronger outcomes.
- Do not think that it is a failure if you have to change plans. We cannot always predict what is going to happen. Indeed, if you can identify changes that affect your project, work out how you can respond to them in order to help meet your overall aim, and then make a case for doing so to your funder, you will have shown that you can respond flexibly to changing circumstances. This is a useful skill for projects, and one that funders are likely to respond to positively. Keeping details of how you have learned and responded in this way may also help you to make a stronger case to potential future funders of your project.

4.3 Using your learning to improve your project

The approaches that we have discussed in this guide should help you to meet funders' requirements effectively. But the last section shows that reporting is not always enough. You should ensure that you can take time to consider what the findings tell you and whether you have to take action to improve your project – or whether they raise matters that you should investigate further.

The table below gives some possible decisions and actions that could arise from the example projects that we have used in this guide.

Finding from outcome tracking	Possible action
Families' worries about the future increase slightly.	Ask parents why this is. Does the way you present information to them increase or reduce worry? Could you change this? Are their worries realistic, and if so, can your project respond? Or have you identified further needs?
Parents of autistic children in contact with the project feel less isolated.	Continue the main work of your project and consider outreach for families not engaging with the project – will you need to make a case for funding to do that?
Young people are engaging with the project.	Continue your main work. Ask young people what has encouraged and enabled them to engage. Share your findings with others and think about how to build further on your success.

Time your self-evaluation and its review for when you are starting to plan for the year ahead. The information that you have will be more relevant and you will be better placed to make informed decisions about the future.

Share your learning

Use your outcomes information to highlight your success. You could distribute a summary of your key outcomes and learning to other projects and organisations you have contact with, make it available to your beneficiaries, and use it to apply for funding to continue to or develop your project: outcome funding offers you more than just paperwork.

Where to find out more

The Big Lottery Fund wants to support applicants in making successful applications to us – and to other funders. This guide can only set out some of the main aspects of our general approach. To find out more, please visit the "Explaining the difference your project makes" section of our website at www.biglotteryfund.org.uk