

## Workbooks

Here are some resources and worksheets to help you start putting the methodologies and processes in this toolkit into practice.

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## Identifying outcomes and outputs

This worksheet should support you in identifying your outputs and outcomes

Identify the outputs required to achieve each objective, in turn then think of the intended outcome / changes that you expect to see in your service users. Please remember that there may be several outcomes relating to one output and several outputs may all result in the same outcome.

Don't forget that more than one outcome may result from one output – similarly, several outputs may all contribute to the same outcome.

We plan to.....

The services/facilities/materials our service-users will receive.....

The results that we will see /out service users will Our service users will achieve.....

Your objectives	Your outputs	Your outcomes
<i>EXAMPLE: TO SUPPORT PARENTS IN PLAY</i>	<i>STRUCTURED PLAY SESSIONS WITH ONE TO ONE SUPPORT</i>	<i>MAKE PARENTS FEEL MORE ABLE TO PLAY WITH THEIR CHILDREN</i>

Finally, make sure that the outcomes you have identified:

- **Are realistic** i.e. achievable within the lifetime of your project
- **Are significant** i.e. they will show most clearly the difference your project makes
- **Reflect what your stakeholders want to know**

## Using a Personal Story

Data does not just have to be numbers; there are excellent ways of gathering data through interviews or observations with service users. Having a structured method of doing this enables you to collate information on the person and their circumstances (past and present) whilst engaging them in looking for the solutions to issues that affect them.

<b>Profile:</b> Name (use a pseudonym if necessary) Gender Age Location Personal circumstances	
<b>Connections to others:</b> (Agencies/Individuals)	
<b>Perception of self:</b>	<b>Aspirations:</b>
<b>Memorable quotes:</b>	<b>Key points that stand out :</b>

## Social Value: Defining additional outcomes

In the following list see if there are any standout outcomes that you could monitor in addition to your standard ones in order to demonstrate social value (*List courtesy of [NVCO Social Value and Commissioning Toolkit 2015](#)*):

- Enable children and young people to maximise their capabilities and have control over their lives
- Create fair employment opportunities (such as the living wage) for young people
- Build community resilience and cohesion within young communities
- Increase children's and young people's safety or well-being
- Provide curriculum or literacy support in schools
- Help develop students' employability and money management skills
- Provide apprenticeships or pathways to employment
- Provide traineeships and work experience opportunities
- Provide National Vocational Qualifications for young employees
- Involve young people in decision making processes
- Use volunteers who learn new skills and gain more confidence
- Make communities or places more environmentally sustainable
- Use local supply chains to help facilitate local regeneration
- Improve the mental well-being of employees or volunteers used to deliver a service
- Reduce anti-social behaviour
- Increase energy efficiency within local communities
- Provide neighbourhood improvement projects

- Help increase easy access to green spaces
- Encourage outdoor activity and alternatives to car use
- Provide sponsorship or cash donations to local organisations or community groups
- Use environmentally sustainable materials and goods
- Eliminate or reduce waste to landfill
- Respect the heritage and distinct identity of your area

## Defining Outcomes

### What is your Mission Statement?

This statement helps you to assert the direction that your organisation is heading to establish your direction. This statement should help you to focus on your goals and ensure that you are prioritising your efforts across projects in a co-ordinated manner.

Once you have developed your Theory of Change, you are well on your way to creating a strategic plan for your Organisation or updating your current plan to reflect this new thinking. By completing this exercise, you will do much of the hard work that goes into a plan such as:

- Identifying the problem that you want to address.
- Articulating your definition/theory of the problem.
- Specifying the desired outcome.
- Developing a plan of intervention, including target populations, tools, time scale and required resources.

## Step One

What is the problem that your organisation wants to address? (Poverty, Inequality, Low educational attainment, Poor health, Violence/crime, Child abuse, Substance abuse.....)

*Things to take into consideration:*

- Your organisations work - resources, legal, cultural, expertise
- Your organisational Vision, Mission and Strategic Plan
- How this relates to your organisation's goals
- Previous Organisational experience in this area
- Who else is funded to work in this area?
- The role of local /national government in addressing the problem

## Step Two

What do you see as the underlying causes of the issue or problem? (For example: 'Low aspirations in the community is largely a result of lack of education and training opportunities')

**Do you have sufficient knowledge to answer the question? If not, who could help you?**

(Consider: Constraints on the Organisation's work - resources, legal, cultural, expertise: Who else if funded to work in this area: Potential partner agencies with related experience: Previous organisational experience in this area: The role of local/national Government)

## Step Three

At what level do you want to work?

- Immediate Alleviation of the issue: homeless shelter, food bank, needle exchange
- Develop a system of service: a network/system that addresses repetitive needs (e.g. a network of foodbanks)
- Empowerment: Deliver services as needed whilst also aiming to change make positive changes to the individual (e.g. youth centre with personal development component)
- Social Transformation/Development of social assets: Supporting groups of people to work together to change systems and/or public policies e.g. Neighbourhood groups

### Consider:

- your available resources (financial/time/knowledge)
- Approaches that have worked/haven't worked for your organisation in the past
- The extent of the experience and knowledge within your organisation
- The extent of your organisations current projects in this area
- The role of local/national government in this area

## Step Four

What impact do you want to achieve? What do you think would the solution to the issue would look like? (e.g. 'Participants would not reoffend as they would gain income, satisfaction and raised levels of self-esteem from paid work').

### Consider:

- your available resources (financial/time/knowledge)
- Approaches that have worked/haven't worked for your organisation in the past
- The extent of the experience and knowledge within your organisation
- The extent of your organisations current projects in this area
- The role of local/national government in this area

## Step Five

Who/what would be impacted? (e.g. Individuals/families/culture/environment/policy and legislation. If you don't know, who could help you identify what needs to change?)

### Consider

- Feedback from target groups
- Complementary programs currently in place in the Organisation
- The available experience and expertise within the Organisation
- Groups discouraged or prevented from doing the desired activity by a common barrier that you can help them overcome
- Groups most receptive to making the desired changes or benefiting the most from the desired changes
- Peers and associates with related experience
- Future or planned work and strategies of the Organisation

## Step Six

How could you reach/influence/impact the identified groups/individuals? What vehicles could you use to do so? (e.g. 'We could access schools via teachers').

### Consider:

- What or who are the key networks in this area to achieve your aim
- Constraints on your Organisation's work - resources, legal, cultural, geographical, expertise
- Previous experience in this area
- Who else is funded to work in this area
- The Organisation's Vision, Mission and Strategic Plan (if available)

Complete a SWOT analysis.

## Step Seven

What tools, processes and resources would you need to impact/influence the identified groups/structures? (e.g. Providing ideas, research and knowledge. Supporting community self-help. Supporting personal self-help. )

### Consider

- Theory of Change - Stages
- The accessibility of the target population(s)
- Networks, programmes and processes currently in place
- Previous Organisational experience in this area
- Who else is funding in this area
- Tools and methodologies that have proven successful
- The Organization's Vision and Mission

## Step Eight

Which resources do you already have?

### Consider

- SWOT Analysis
- Identification of skill and resource needs - gap analysis
- Mapping skill sets and resources available within the Organization against the goals/objectives - include intangible
- Organizational assets e.g. reputation, contacts, access to key/influential people
- Mapping the external resources and skills you have access to or experience with
- Synergies from other initiatives work or experience

## Step Nine

What skills, knowledge and other resources do you need to develop?

**Consider:**

- How can you capitalise on the resources of people who have/are involved in the issue or problem? Use the result of SWOT and mapping exercises.

## Step Ten

What are the opportunities for partnership working? Will there be competition?

### Consider:

- Types of Partnerships
- Motivations for Partnering
- Networks of organizations, Associations, programmes and processes currently in place with target population(s)
- Previous Organizational experience in this or a related area
- Recent publications from others funding or supporting work in this area
- what skills and resources can you share/borrow?

## Step Eleven

- How will you know when you have succeeded?
- What does progress or success look like after: 1 year/3 years/5 years?
- What are the indicators to show progress/impact?

### Consider

- Gathering evidence and developing an evaluation plan
- Being clear on the intent, goals and objectives of the organisation/project
- Evaluation approaches that have been used by the Organisation the past

### Review:

**Go back through your answers to the questions do you feel that your answers provide a way ahead for the organisation?**

- Is this something our organisation can work with?
- Will the Organization be comfortable and in agreement with this proposal as:
- A reasonable analysis of the issues?
- An accurate analysis of the current situation
- A viable plan of action for your Organisation taking into consideration the values, mission statement, income, and capacity?

### If not:

Get further input from colleagues and associates.

Consider the mission, strategies and resources of the Organisation as the feasibility of this plan.

Repeat the process.

## Defining outcomes from your project

Using an evidence planning tool will help you to improve on the work that you do as well as define what you would like to achieve. Through focussing on your works beneficiaries, activities and partner organisations this tool should help you to put together an evidenced based case for the impact you want to achieve.

You can use this to plan what you want to achieve in the future and reflect on what you would like to do differently or what you would like to build upon.

### How to Use the matrix

Begin by stating the key focus for your project/organisation in the middle of the worksheet. From this use the 4 sections surrounding to reflect on what your key focus enhances, replaces or even limits. Think of changes that your work would make in the sector, on other public and private bodies, as well as the effect it would have on the society. This offers you a mirror to consider the impact your work may have.

Look at the key aspects from diverse points of view. While filling out the four sections think of:

- The wider world.
- Your particular field or area of interest.
- Your beneficiaries
- Your organisation

Enhance

What is the additional value/s?

Replace

What makes it less desirable

What is the key focus  
of your  
project/organisation?

Re-use

What does it build upon or add to?

Limit

What are the limitations? is there a tipping point?

## Swot analysis

### What is it and why should I do it?

SWOT stands for Strengths, Weaknesses, Opportunities and Threats. A SWOT analysis can be carried out for a specific project, organisation or even a whole sector. This analysis leads to a richer understanding of what can be offered, key weaknesses that need to be addressed in order to succeed, and where to bring in external partners for assistance. Completing a SWOT analysis involves identifying and mapping the internal and external factors that are assisting or hindering you in achieving your goal. The SWOT analysis provides a good framework for reviewing current strategies and directions, or even to test an idea while exploring solutions. It is particularly helpful to do a SWOT Analysis before the start of a project.

Complete each of the squares in the worksheet according to what you see as your or your organisation's strengths and weaknesses as well as the external opportunities and threats that may help or hinder you.

<p style="text-align: center;"><b>Strengths</b></p> <ul style="list-style-type: none"> <li>• What do you do better than anyone else?</li> <li>• What makes you unique?</li> <li>• What unique or lowest-cost resources can you draw upon that others can't?</li> <li>• What do people in your market see as your strengths?</li> </ul>	<p style="text-align: center;"><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>• What could you improve?</li> <li>• What should you avoid?</li> <li>• What are things that users might see as weaknesses</li> </ul>
<p style="text-align: center;"><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>• Do people have a need?</li> <li>• Do people prefer something else?</li> <li>• Are there any changes in technology?</li> <li>• Are there changes in government policy</li> </ul>	<p style="text-align: center;"><b>Threats</b></p> <ul style="list-style-type: none"> <li>• What challenges do you face?</li> <li>• What are your competitors doing?</li> <li>• Is there an issue with finances?</li> </ul>

## Here are some tips to help you further:

- **Be prepared:** Get your facts and figures in place before you do the analysis
- **Be comprehensive:** Include all details, from the smallest ones (e.g. for issues at the most micro level like discussions in your team) to large ones (e.g. for new government regulation) that can impact your work
- **Be self-critical:** SWOT analysis is there to stimulate critical reflection, not just to please yourself and/or others. Be open and don't get defensive. It is normal to have weaknesses as well as strengths, and to see both threats and opportunities. Sometimes talking about weaknesses or threats can even help you to recognise strengths and opportunities
- **Test your analysis with others:** Include others or maybe even ask an outsider (like your partner organisation) to do the same exercise and compare their views with your findings
- **Repeat the analysis:** As you go on with your work, new learnings and factors are bound to come up. Re-visit the SWOT Analysis to align your work and its course once every quarter or twice a year
- **Use it as a guide:** Don't rely on SWOT too much – it's a guide that can help scope the way for further development

**Strengths**

**Weaknesses**

**Opportunities**

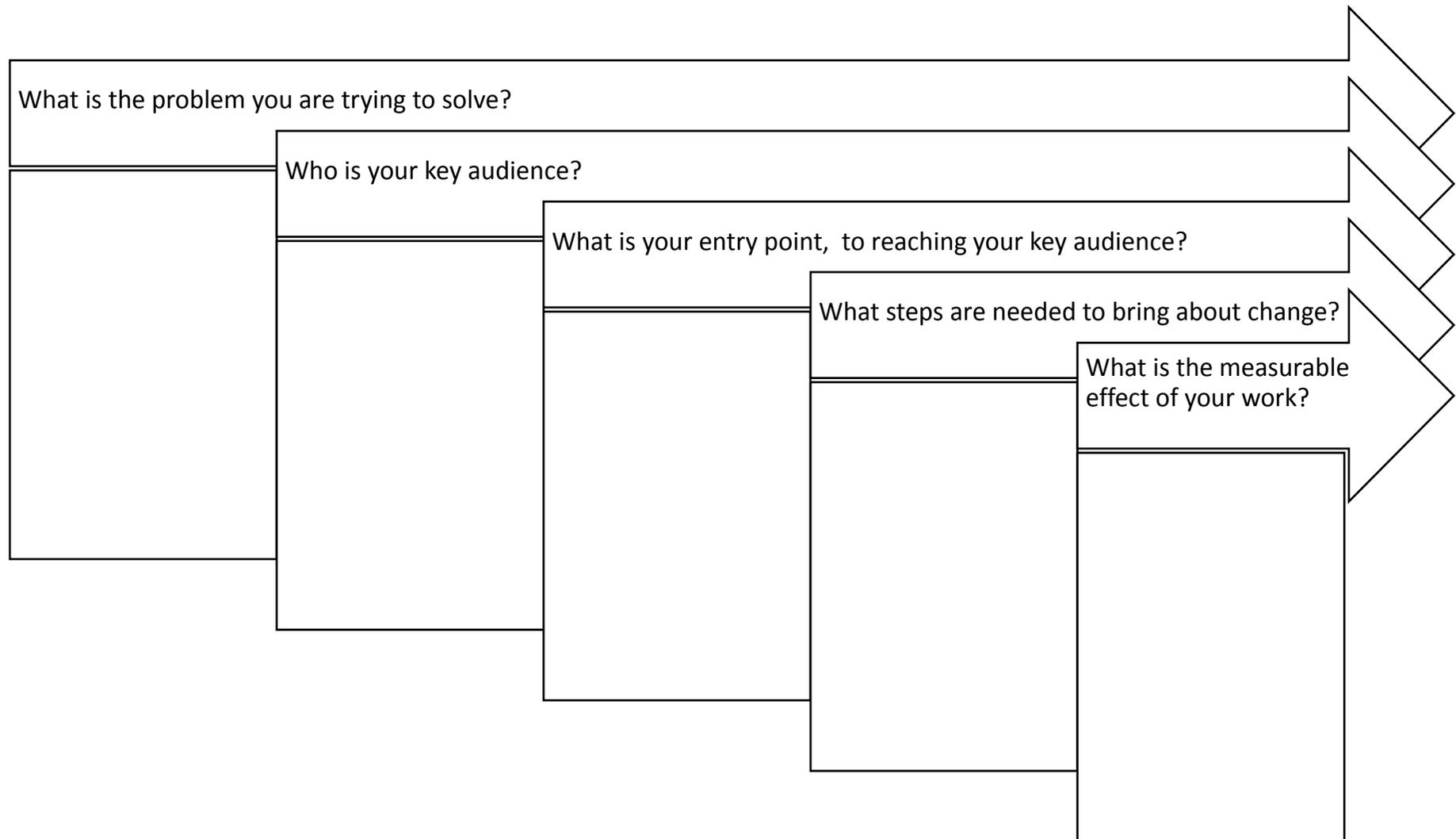
**Threats**

## Theory of change

Setting up a Theory of Change can seem a large task and therefore it is helpful to break down what you would like your focus to be and therefore outline the steps you need to make to achieve your goal.

By breaking the process down you may be more likely to spot potential risks in your plan through sharing the underlying assumptions in each step. When looking at more than one project this can also help you map your services and have a clearer picture of how they relate to each other which should also ensure that colleagues are better aligned to the organisational goal and have a greater understanding of the part they play in this.

- Using the sheet on the next page; note the main issue that you would like to resolve and the change you would like to affect long term. From this you can then identify the key service users/stakeholders and how these can be reached and engaged. Be as specific as possible to ensure that you remain focussed in the issue you are exploring.
- Explore the key people and organisations that will be most affected by the issue you identified and who may be able to support your work, from this you should then be able to identify a starting point, whether this is a person/place/organisation.
- What will be your immediate outputs and outcomes? How will these link to the longer term changes?
- As you work through each of the boxes it will be critical to also reflect on the key assumptions that underpin these steps in your work. This may help you to spot potential risks or connections between the different projects.



## Writing a Project Delivery Report Template

<p><b>Summary and key messages</b></p>
<p>Summarise the project, its focus, beneficiaries, location and outcomes intended. Key learning from the project.</p>
<p><b>Introduction</b></p>
<p>Back ground of project – why did the project come about? What was the need? Local data on beneficiaries/describing need Service user profile The reasoning and focus of the project – why is it necessary what do you want to achieve? Project beneficiaries – who will you be supporting? List key outputs and outcomes, the length of the project Who has funded this work</p>
<p><b>Methodology of the work undertaken /delivery model</b></p>
<p>Engagement and participation – what were the methods of engagement? What support was offered to the beneficiaries – personalised/group/peer e.g. Advocacy, Personalised support, Peer work, Group Work, Asset based, needs based.</p>

Reach and scope of the project – both outputs and locality specific.

Exit strategies

### **Outcomes for the beneficiaries**

Specify the outcomes and whether they were met for example:

Changes in the issues being addressed – positive/negative – expected/ unexpected?

Behaviour changes of the beneficiaries

Progression pathways

Impact measurement tools used

Evaluation processes

### **Evaluation**

Evaluation processes used

Cost saving/social value

Qualitative evidence

Examples of good practice

Feedback from other organisations – any outcomes for these?

Case Studies

Areas for future development