IMPACT MANAGEMENT PROJECT

Exploring how beneficiaries/customers describe their impact expectations

Conducted by Social Spider CIC on behalf of The Impact Management Project

December 2016

Additionality
Agency
Appraisal
Appreciation
Assessment
Attribution
B Corporation
Base case
Baseline
Benchmark

INTRODUCTION

We want to understand people's experiences with social services and activities, and how they have influenced impact expectations

Background to the research

The Impact Management Project commissioned Social Spider CIC to conduct a series of interviews with groups and individual users/beneficiaries of social services and activities in order to:

(a) get a snapshot indication of people's situations, future goals and priorities when engaging with services, and to

(b) get an impression of how people describe these situations, future goals and priorities.

Methodology

For this project Social Spider conducted a series of individual interviews and two focus group discussions. The interviews and focus groups were guided by sets of questions and prompts which are included as an appendix.

The focus groups began by discussing participants' experiences of particular community-based services and went on to explore wider issues around their interaction with services in general. The interviews were more general discussions about how people interact with a range of services including public services.

Interviews and focus groups were conducted during December 2016. There were a total of 16 participants across the focus groups and individual interviews. The interviewees spanned from age ranges of 20-29 to 70-79.

They included representation from a range of religious, ethnic and professional backgrounds. A roughly even balance of men and women were interviewed. Most participants are based in and around the London Borough of Waltham Forest in East London.

Note on terminology

In the paper that follows, the term 'funder' is used to describe a range of stakeholders - including public sector agencies, philanthropic grant funders and investors - who provide finance for social activities but are not directly responsible for delivering those services.

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Chapters and summary of key findings

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Progression of goals

People conceptualise their goals in different ways at different stages of their interactions with an organisation: from the initial decision to get involved, to continuing to engage and put trust in the service, to looking back on the experience with hindsight.

2

Situational vs. intrinsic goals

People often access services because they are trying to address something negative in their life and are rarely focused on long-term impact and intrinsic goals as an initial motivation.

3

Situational vs. transactionals

People understand their interactions with different types of services in different ways - often having more transactional goals for interactions with public services while seeking more relational interactions with voluntary sector groups.

4

Do you know what you want?

People often have broad goals for their lives - such as being happier and being involved in something meaningful - but do not necessarily know what they need from a service provider to help them achieve these outcomes and will not necessarily consider them when initially accessing a service.

5

Funders, organisations and users: Language and ideas

People perceive major disparities between what they value about organisations' work and what 'funders' value - they perceive that 'funders' rhetoric' is focused on individual transformation and single non-negotiable outcomes, rather than small, incremental changes.

People are sceptical of organisations that seem to pursue prescriptive goals which are imposed on users to fulfill mission statements or funders' requirements .

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About the Authors

The report was written by Anna Merryfield, Mark Brown and David Floyd of Social Spider CIC: a small social enterprise based in Walthamstow, East London delivering research, writing, publishing and training services as well as running its own local and national projects.

Social Spider CIC has carried out research on social investment and the wider social economy for funders and clients including: Big Lottery Fund, Centre for Public Impact at Boston Consulting Group, Esmee Fairbairn Foundation, Power to Change, Public Health England and RBS.

PRO**GRESSION OF GOALS**

Across our interviews and focus groups, a pattern began to emerge of how people conceptualise their goals when accessing a service

Initial stages: Trialling (avoiding negative experiences, cautious)

Often, people are wary when initially accessing a service. They are unsure of how suited it will be to their needs. Therefore, in the initial stages they can be easily swayed or put off by a negative experience and are cautious and less likely to commit to conceptualising broader goals.

This appeared to be a self-preservation tactic; participants knew they would be making themselves vulnerable to disappointment if they allowed themselves to have high hopes for the outcomes of the service. This caution tended to have come as the result of previous disappointing experiences.

A lot of people discussed first impressions. In those instances **it would appear that most people's initial goal was to find an environment they felt comfortable in**, with people who seem welcoming and supportive. At the most basic level, they are looking to 'not-be-put-off', to avoid feeling intimidated or unwelcome.

'It can just take one person to annoy you and your whole vision of the organisation can go.'

'It might be catered to you, and you go along, and have a really bad experience.'

'I just knew it, straight away I felt at ease which enabled me to come back [...] I just knew I had to do something.'

Mid-way: Engaging (what can I make from this, how will I fit in, what is there to gain, creating meaning, creating routine, challenging self, challenging the service)

At this stage, if people have stuck with the service, they tend to develop confidence in its ability to meet their needs.

They feel comfortable setting realistic and achievable goals. When proof of a service's ability to deliver accumulates, people put trust and faith in the service provider. **At this point, goals are more likely to be understood as something which can be gained; as a desired positive outcome, moving beyond just tackling a negative situation**. This is because they have empirical proof that they can gain something from working with this organisation.

'We've come and have figured out ourselves what it means to us and where we fit in.'

'It's comforting to know that there is something here.'

'To find support to find an opportunity to socialise, to find a way to use our skills and our knowledge - so [this organisation] was just an avenue really to do those things.'

'We've come and figured out that this is something we enjoy doing and being involved in.'

Hindsight: (collectively my experiences here have contributed towards me feeling more social, belonging, meaningful, purposeful, fun)

Looking back on their time with a service they have committed to for a significant period, beneficiaries appear more able to assess the ways in which the service has helped them move closer to larger, intrinsic goals. It is at this point that the more abstract notions of belonging, community, value, self-worth come in and **they begin to develop a story or narrative of progress and self-growth tied to the organisation**.

'There were things that I gained, socially […] that were critical'

'It was amazing for me because I got to do arts and mosaics and it built my confidence up enormously.'

'The feeling of belonging, that was very important to me'

'I'm not quite sure where I'd be now if I didn't have this.'

It is unclear whether this stage of conceptualisation would have occurred if the participants had not been prompted to reflect holistically on their experiences by the interviewer.

Observations

Beneficiaries often look back on their time accessing a service and see how small realistic goals have contributed incrementally to larger goals. Overcoming a challenge can now also be seen as helping move X's life in the direction they want. At this stage they may make links between their own outcomes and the outcomes of the organisation.

SITUATIONAL VS. INTRINSIC GOALS

An individual may not want to change, or may not want to change in the way that funders would like, they may just wish to overcome a minor obstacle like getting out of the house or to find a place where they feel welcome and normal

The participants we interviewed often initially accessed a service because they were tackling or trying to overcome a situational problem, often something negative that was affecting their quality of life.

When asked, 'why did you access this particular service?' participants gave the following answers:

'Because I want my life to be better…I'm stuck.'

'I knew I had to do something because I'd had a stroke […] I'm not good at [motivating myself] at home.'

'I just kind of fell upon it.'

'The easiest thing would have been to stay at home […] but I needed to be with people.'

'The key things were that I needed [something] social, and a supportive atmosphere, to feel that I belonged somewhere […] it's quite a basic human need.'

Funders often aim for long term impacts and stress intrinsic change: changing the individual so that they exit from the funded activity being changed in a way that will enable them to sustain whatever outcomes are intended. We perceived a tension between these two forms of change for beneficiaries. The first tension is that **an individual may not want to change, or may not want to change in the way that funders would like, they may just wish to overcome a minor obstacle** like getting out the house or to find a place where they feel welcome and normal. For some, **overcoming a minor obstacle may be a step towards a transformational change** but the desire to make that change may not arise before a series of steps have been taken towards it. For others, help in overcoming that minor obstacle may be all they want from the service and they may not be seeking a wider transformation of their situation at all.

The second is that by situating the change to be made within the individual, organisations and funders benignly dismiss real world concerns and understandings and thus require far greater effort to encourage 'buy-in' from beneficiaries. At a basic level, someone may not be socialising in their local area because suitable opportunities to socialise are not available - what they need is a suitable opportunity to socialise, not the support to become a person who is able to socialise.

SITUATIONAL VS. INTRINSIC GOALS CONT'D

For the people we spoke to, situational negatives could range from:

I have a child and I don't want to stay in the house all the time and be anti-social, and not allow my child to make friends and, therefore, I access a children's play area at my local community centre.

I suffer from severe depression and am isolated at home and, therefore, I access a community support and craft group to get me out of the house for socialising.

From this initial perspective goals are framed as identifying and overcoming a factor in their life which the beneficiary considers to be negative, and scoping out a solution to that negativity. As such, it would be possible to see these goals as solving something immediate, rather than long term.

It seems that the goals were less outcome focused and were more likely to be focused on overcoming a particular challenge. The phrase 'stepping stone' was used on multiple occasions during our interviews, indicating that **beneficiaries often accessed a service to tackle one obstacle seen as part of a greater process which the organisation may or may not play a part in**. In framing it this way, beneficiaries indicated that they were realistic about the outcomes which could be achieved through the service and understood that it took time before they felt they could assess whether the service was appropriate for helping them achieve more long term and potentially transformative goals.

Observations

Once a user has accessed a service for a significant period of time, it would appear that they move towards evaluating their experiences as contributing either positively or negatively towards broader, long term goals and outcomes. This might result from a focus on immediate relief for a particular negative allowing space to look beyond the short term, or it may represent a reframing of experience in light of input from the organisation providing the opportunity. We will develop this point in chapter five.

SITUATIONAL VS. INTRINSIC GOALS CONT'D

Positive experiences empower people to focus on the best aspects of themselves, shifting gears to pursue long term intrinsic goals

Case Study One

The first case study involves two retired women volunteering at a community centre. When asked why they initially became involved in the community centre, they framed their aims as overcoming a negative situation that they found themselves in.

> 'I needed something to do with my time.'

> 'I felt an obligation to do something useful.'

> 'I didn't want to fill time selfishly post-retirement.'

However, when asked why they were continuing with their engagement and what they had thought of their time there, they referred frequently to greater, more positive goals:

> 'It gives me a sense of community.'

> 'It gives me a sense of worth.'

> 'I feel valued.'

They compared their engagement with the community centre as being like 'a secular church'. They described it as a spiritually enriching experience.

Their interpretation of **what they could gain from accessing the service shifted from being situational (I have a situation which I need to resolve) to intrinsic (I have been changed in a more fundamental way by accessing this service).**

They stated that their experience had given them an opportunity to focus on the best aspects of themselves, bringing out the positives of who they are. They measured their experience both in what they had gained but also in terms of what they had avoided, i.e. they had avoided the negative aspects of retirement they had set out to tackle.

Case Study Two - Part One

We interviewed a support group for people accessing Employment Support Allowance, a UK out-of-work social security benefit operating as part of the wider Work Programme scheme, which ties benefit entitlement to work-related activity. People could also access this group through self-referral independent of social security entitlement obligations.

Most members of the group stated that they were initially nervous to join. They saw attending the group as overcoming a series of challenges: even leaving the house was a difficult challenge to overcome. There was a big focus on 'getting people

SITUATIONAL VS. INTRINSIC GOALS CONT'D

out and about'. For these beneficiaries, establishing and sticking to a routine was a goal in itself:

> 'The more you do it, the more you get used to it, the more confidence you gain.'

The focus of the group was on realistic and achievable goals, often working up to attending job interviews. Progress was understood as a series of steps to be tackled one day at a time.

> 'Coming here helps you overcome challenges.'

Members of the group stated that having a structured routine helped them focus on achievable goals and make timelines for their completion. **However, as members built up confidence, their series of small achievements seen in aggregate amounted to a 'transformative' experience**.

At this stage, it was said that people accessing the service had undergone huge changes, prompting an intrinsic shift in the member and making them into 'a different person'.

> 'It's a close-knit group, this helped me build my confidence.'

> 'I've made huge steps.'

> 'The transformation is amazing.'

Given that the majority of people at this group came by Work Programme referral, users knew that achieving specific goals was an intrinsic component of the service, an idea which was built into the rhetoric of their discussions early on, this then affected their expectations of the service.

Within this group, there was a strong focus on participation and inclusion; giving users a say in the activities they undertook. Having an input in the structure of the sessions was seen as important to the service users, as was the fact that the group was peer-led, i.e. led by people who had previously been on ESA and had accessed a similar service as a user. This reinforced the vision that small goals were achievable and eventual transformation was possible. It also reassured users that small goals were important, and that it was ok and normal to spend a long time overcoming small situational challenges such as being able to use public transport.

Users interviewed expressed great praise for the sessions.

One of its most notable achievements was the way in which **it made its users feel normal, it normalised their experiences and challenges**. **In doing so, over time, it changed how people saw themselves**. Although their goals may have been largely practical to begin with (overcoming a situational

SITUATIONAL VS. INTRINSIC GOALS CONT'D

Building a sense of normality and routine are very important goals for beneficiaries

difficulty), it also succeeding in fulfilling an underlying ambition to belong somewhere, a goal which many would have been unwilling to acknowledge at the beginning (i.e. during the 'trialling stage' described in chapter one) and this is where the success of the group appeared to lie.

This notion of finding somewhere where you can feel normal was emphasised in some of our other individual interviews. In one interview with an end user of a public sector mental health service, the user stated that the service provider 'made me feel less unusual. That was good. Less of an oddity.'

Observations

It would appear that a sense of normality and routine are very important goals for beneficiaries. However, it was thought to be unlikely that these outcomes will feature in an organisation's mission statement and it is perhaps even less likely that they will be used to win a funding bid for an organisation. Participants were concerned that the organisations they used would lose out on funding because of this.

'The one thing you definitely need is stability – it's underestimated.'

''Knowing it was here, and knowing it didn't matter if I came down… [provided great comfort].'

SITUATIONAL VS. TRANSACTIONALS

We want to understand the differences between public sector services and community-based services

Beneficiaries tended to conceptualise their goals very differently depending upon whether they were accessing a public/private sector service or a voluntary sector service.

The following shows a cluster of feelings and concerns that participants communicated to us relating to their experiences of **public sector services**:

- *More nervous*
- *Feeling rushed*
- *Skeptical it will provide correct help*
- *Scared it will diminish own control over experience*
- *Worried you're only there to fulfil certain goals for organisation*
- *Goals of institution potentially in conflict with own, feeling that they are imposed upon user*
- *Tend to fall below expectations, beneficiaries anticipate negative outcomes*
- *Concern that you are in a system and will be spat out the other end, that you will no longer be welcome, if you fulfil the goals the organisation holds for you*
- *Anxiety that organisations will be very strict: if you miss one session you're out*

Participants did note that it had the benefit of making the user feel as though once they were in the system they would be tracked, and therefore would be less likely to slip through the net.

'For me, being part of the NHS gave me security that I was in a system. So if anything went wrong I was in a system.'

Our participants knew they were entitled to public-sector support and therefore tended to approach it as customers looking for delivery of a specific result; despite remaining skeptical of its capability to deliver that result. This also caused anxiety over their own ability to hold up their end of the transactional relationship, for example concern that if they were unable to attend sessions they would lose their consumer right to the service.

Overall people conceptualised their relationship with public sector providers as transactional: **I am here so that you can help me**.

'I want them to help me.'

'They've got a magic wand.'

'With CBT if I phone up to say I'm unwell [...] then I'm off [the programme].'

SITUATIONAL VS. TRANSACTIONALS CONT'D

Below is a cluster of feelings and ideas expressed relating to participants experiences of voluntary sector services:

- *Idea that you can still have something to give, mutually beneficial, not just receiving*
- *Feeling involved*
- *Feel valued*
- *Belonging*
- *Providing a safe space, a judgement-free zone*

Overall, people conceptualised their relationship with non-statutory service providers as relational: I am here because I want to help myself.

'I want them to help me, something like this [a charity or voluntary service] I want to help myself.'

'[NHS provided] CBT, it's regimented [...] feels like a classroom [...] whereas here [...] they don't work in the same way because they're supporting you and can understand that you might be more vulnerable at certain times.'

N.B. due to its limited scale, this research reflects a disproportionately high level of satisfied voluntary sector service users. This reflects the success of the particular services we interacted with, but further research may demonstrate a higher level of discontent amongst users of other voluntary sector services.

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DO YOU KNOW WHAT YOU WANT?

Although beneficiaries often hold notional ideas of broader long term goals, they rarely know what is needed to achieve these goals

Most participants we spoke to did hold notional ideas of broader long term goals they would like to achieve. These goals were normally general ideas of the kind of person they would like to be, and were not necessarily linked to their participation with particular services. This link was even less likely to be made in the initial stages of accessing a service.

Despite holding these more general ambitions, we found that beneficiaries rarely knew exactly what they needed to achieve these goals.

> 'A lot of people do know what they want out of life. They just don't know how to do it.'

As a result our interviewees tended to test the services they knew were available. **They then trusted their ability to discern whether or not a service was right/could be useful for them, even if they were unable to say in advance what it is exactly that they needed.**

> 'You don't know what you need until you get it.'

> 'If it hadn't existed, I wouldn't have thought this was what I needed.'

> 'All these variables [spectrum of mental health experiences] mean that people have different abilities in terms of even knowing what might be helpful to them or not at different stages.'

> 'I just kind of fell upon it.'

On the other hand, beneficiaries described accessing **public sector services** because they believed they knew what they needed for themselves and had sought out the solution promised by the providers. However, they still remained doubtful that the provider would actually be able to deliver the results they needed.

FUNDERS, ORGANISATIONS AND USERS

Invisible and intangible benefits are difficult to capture with existing language, resulting in conflict between social organisations and funders

The participants we interviewed **demonstrated an awareness of the funding process** and acknowledged that formalities such as mission statements were important for organisations when applying for funding.

> 'I know that funders want things that are measurable, don't they? They want you to kind of prove your worth as part of getting the money. To measure the difference that the money's made.'

> 'The mission statement is important to understand what the organisation's about, what it's trying to achieve, and to tell the world.'

However, **they also saw this process as 'intellectualising' what social organisations did**, and believed that it often led to a 'language clash', whereby organisations were forced to adopt official funding rhetoric that didn't capture the invisible and intangible benefits of the work they did.

> 'I hate all the new long words [...] they should be a paragraph, not a chapter.'

> 'I don't think funders get the clarity they need, they just go on statistics.'

They felt they were 'speaking a different language'.

These invisible and intangible benefits were more often what the beneficiaries valued, yet they were aware that they could not come across strongly in the feedback process and so would also feedback in a manner they anticipated would be more useful to the organisation. **They believed the best way funders could grasp the success of an organisation was to see it in operation in person**.

> 'They need to listen to the shop floor.'

> 'They need to know what we know.'

> 'It's ridiculous if funders are thinking [...] that their money's well spent on the basis of people's feedback [referring to feedback forms] - [funders] need to understand case studies and people's individual situations.'

However, it was also acknowledged that there were drawbacks to this approach too. They noted that organisations would change their set-up on the day they anticipated a visit from funders so that they could show their best side. They acknowledged that getting genuine and authentic feedback was difficult to achieve.

It should be noted here that the participants we interviewed

generally did not have an entirely clear understanding of the entirety of the funding processes undergone by the services they used. Therefore, their answers represent only their perception of how funders operate, from what they have observed, and should be understood as such. They were quick to defend their organisations, which they often perceived to be threatened by the possibility of funders' not understanding its worth.

Participants often felt funders' goals were in conflict with their own. It was thought that funders' goals were often static and specific, not responsive and malleable to users' changing and varying needs.

> 'A lot of the funding they got was all tied in with stats on people progressing on to do courses […] to be honest it really was a case of the funders...I mean the amount of effort and intellectual gymnastics that had to be gone through to put a case together to fulfil the funders when you've got people like myself who - I did want to get back to work but that was highly unlikely - people with long term mental health problems, like schizophrenia, their goal was not getting back to work. [Their] sense of belonging, their sense of self worth, they all needed to be improved upon.'

Throughout the course of our research it became apparent that **beneficiaries' initial goals when accessing a service, were far less transformative than the goals the organisations and funders set out for them**.

Generally they were either:

i) practical: I would like to learn a skill, tackle a situational difficulty, or

ii) situational: I would like to go somewhere social where I feel I belong, where I feel safe.

Funders and organisations tended to frame their goals as transformative: facilitating an intrinsic change in the user. For example, making them more 'empowered' or moving them along a trajectory towards a specific marker of success.

One user suggested that it could quite likely be the case that they could be accessing a service and their condition might still be deteriorating, however it could be deteriorating less rapidly than if they had no service at all. They believed that strict funders' goals are unlikely to take this into account as this cannot be quantified or measured, however for a beneficiary, preventing rapid deterioration could be immeasurably important.

FUNDERS, ORGANISATIONS AND USERS CONT'D

While funders look for tangible outcomes, beneficiaries worry that they fail to articulate the intangible benefits that they personally experienced
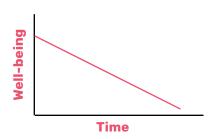
In this instance the beneficiary represented this as a graph:

With service:

Without service:

> '[...] all the statistics you have to evidence what the money's achieved and when you're talking about people feeling a sense of belonging or finding a purpose or just that they've got somewhere to go where they're welcome - that's difficult [to measure/communicate]'

Quantifying intangible benefits

One user stated that her primary activity when accessing a particular service, was sorting through buttons, putting them into different piles. However in reality what she was really doing was engaging herself in a supportive community, getting out of the house and tackling a sense of isolation, purposelessness and depression. She felt the literal activity she did could not reflect the benefits she gained from being part of this community and doing that work.

> 'You can't see the invisible support you've given me mentally.'

Her concern was that this benefit could not be articulated to demonstrate a tangible activity or selling point for the organisation, and that when the organisation was writing funding applications they would be unable to communicate this hidden benefit that she valued so strongly. **Overall, the participants we spoke with were concerned that funders were looking for tangible outcomes and that the organisations they valued so highly could not compete on those grounds**.

> 'These things of measuring [...] they may be beneficial if you're in a much better place - it works for some people.'

Observations

Funders' goals were seen to aspire towards single non-negotiable outcomes , which can not reflect the diversity of needs of beneficiaries or of varying organisations services.

FUNDERS, ORGANISATIONS AND USERS CONT'D

As a result, organisations applying for funding are bound by funders' rhetoric; translating their impact into a series of key phrases such as 'empowerment', 'community' and 'transformation'. This process of translation was seen to simplify the complex and varying experiences, needs and desires of a service's beneficiaries, distancing the stated outcomes from the lived experiences of the beneficiaries and their interaction with service providers.

It should be noted that it is not in itself wrong or unusual that the users' needs and organisation's needs, for example, would be different. It is legitimate for a funder to want to pay for more people to progress to accredited training courses as a result of an intervention, while not wanting to pay for an intervention (solely) because it gives people a greater 'sense of belonging' or results in someone being 'in a better place'.

But there are, however, questions about how well provision meets individual needs and whether a misunderstanding of users' goals negatively affect the funding process. Therefore, it is necessary to assess whether our participants' concerns were correct; are organisations that do not have clear and quantifiable outputs less likely to receive funding than those that do, even if the service-users find those activities to be more beneficial?

'It's not always about achieving the mission statement, it's about being part of something.'

Users' goals vs. organisation's goals

We found that **the more prescriptive an organisation's goals are perceived to be, the more skeptical its users will be of the organisation's ability to help them achieve those goals**. Users tend to become more reserved the more an organisation's goals are imposed upon them.

Users stated that having their needs described in terms of wider goals made the experience feel less tailored to them as individuals and as a result the user lost a sense of control over their participation. The relationship between user and organisation then erred towards being transactional, as opposed to relational, because the organisation had promised an outcome which the user then worked with them to attain.

Transactional in this sense would mean a kind of consumer chosen service, where the individual signed up for a process or opportunity knowing in advance exactly what they sought to gain from it by its end, rather than joining something initially to meet an immediate need with an

FUNDERS, ORGANISATIONS AND USERS CONT'D

Declaring an organisation's goals and intentions on the outset can be seen as patronising, making unwarranted assumptions about the beneficiaries

In the following example, one participant explains that when they access NHS (statutory health) services, they feel more like a consumer because they know that they are able to move on to other services if they feel the one they're currently accessing isn't appropriate for them: they are able to exercise their consumer choice as they know they are entitled to it. However, they felt that if they were paying for the service, this would put more pressure on them to make it work, causing them unwanted stress.

'If we were somewhere like America [where we had to pay for services] I know I wouldn't even access them because it would just put me right off. The way they're like with the scoring, the way they tell you things [...] I don't want to waste my money on this if I don't know if it's going to work. But here [in the UK] I know I'm in the system, if it doesn't work I know there's something else I can try [...] so yes, it feels like a customer.'

In this example the participant feels as though the negative aspects of the NHS services are counterbalanced by the fact that it is a free service which they as citizens are entitled to.

It was also stated that **having goals at the forefront of the organisation's communications can be seen as patronising, especially at the beginning stages**. This was in some sense because the language and formulation of higher level goals made assumptions about where the individual was in relation to a goal and what their chosen path should be in achieving it.

'You just want to know what is available, and what you'll do when you're there.'

Knowing the expressed or implied end point of a service via its goal for you is not necessarily helpful. Some users stated that knowing the organisation's goals can make you feel rushed. They stated that if you're feeling 'fragile', knowing the end goal of the organisation can make you feel like a bit of a burden for not achieving it as quickly or as simply as the organisation might like.

'It can be detrimental, in a lot of cases, for the members, end-users, customers, whatever you call them, to know the mission statement, goals and all the rest of it. Because I think it's like a burden and that's the end of things that moves into politics and that's not a good place if you're feeling fragile mentally.'

FUNDERS, ORGANISATIONS AND USERS CONT'D

In this case knowing the goal of the organisation or service was not seen as being the same as being informed of the actual things that service offered. This gap between actual practical offering and direction toward a particular end via the practical offering made assumptions about where someone began relative to the service being provided and made similar assumptions about where the organisation expected them to end up during or after the service had interacted with them.

Initially, the goal of the user will often not be the same as the goal of the organisation:

> 'It might not be about achieving a goal or getting somewhere someday, it's just about being part of something.'

Case Study Three

We conducted research with a community craft and support service for people suffering from mental health difficulties. The primary goal of this organisation is to foster a greater sense of community and support.

During our round-table, one user stated that her initial goal was to get out of the house more, and to have something structured that would motivate her to do so. She was not motivated by the overall purpose of the organisation, but was enticed by the practical opportunities it offered her to become involved in arts and crafts. She had her own particular attachment to haberdasheries from her childhood, and given that the layout of this organisation is similar to a traditional haberdashery she liked the prospect of spending more time there. This is what had initially piqued her interest in the organisation when she stumbled across it.

However, during the course of the discussion, and upon further reflection, she stated that she could see that the overall goal of the organisation had in some way been achieved in her, and that it had affected her in the way it had intended. She did indeed feel as though she was now part of a community and that her social support network had been strengthened.

However, the mission statement was not what motivated her initially. She stated that:

> 'What matters is not what the organisation says it does, but what it actually does.'

PEFORMATIVITY OF THE MISSION STATEMENT

Nevertheless, the mission statement has not been rendered meaningless; instead, it plays an important performative function

We observed that **over time beneficiaries seem to align their goals and outcomes with the goals and outcomes of the organisation they are receiving the services from**, especially if they are a voluntary sector organisation which they are choosing to attend and that the beneficiary develops a personal attachment and loyalty to.

For example, having a paid job in a haberdashery may inadvertently give you a sense of belonging, community and value. However, you are unlikely to frame your goals for working there in this way as you are more likely to frame your purpose for being there in light of your paid commitment. It would require a deeper reflection to realise the way in which it fulfils this function.

On the other hand, participating in a craft and support group which functions similarly to a haberdashery prompted one of our interviewees to perceive her experience very differently to how it is likely she would have if she had been engaging in paid work.

In this situation the **mission statement serves a performative function: it encourages the beneficiary to see their goals through that lens of the organisation**. A practice which becomes more successful the longer the beneficiary stays with the service.

There are also other variables affecting how the user perceives their involvement in a service:

- Obligation: are they obliged to attend or are they choosing to? Are they choosing to attend for no cost or are they paying?

Our research thus far suggests that paying for a service or being obliged to attend a service will prompt a user to see this as a transactional relationship wherein they are entitled to a set of outcomes and as a result they may be less concerned with or expectant of their own involvement in the service delivery.

- Set outcomes: is there a set outcome that they are working towards as a precondition of involvement or are they measuring their own progress and achievement?

Our research thus far suggests that having a set of specific outcomes will make users feel as though they are part of a system but will also make them concerned that they will 'get it wrong' and will no longer be entitled to the service. They are less likely to feel involved in the process as they are handing over a level of their autonomy to the service provider who is entrusted with bringing around the set outcomes.

INVOLVEMENT

Being involved in shaping an organisation's activities was important for end users but might run counter to funder goals

Our qualitative research found that people enjoyed taking control over their participation and becoming more involved in the form of its delivery. It was often said that **having a say in how the organisation was run and an involvement in shaping its future activities was important to the end users**.

Case Study Two - Part Two

ESA support group

During our discussion with this group it was reiterated that having an involvement in deciding upon the activities the group undertook (within a reasonable scope) was very important to the users and gave them a sense of ownership over their participation. It would appear that this was a factor which differentiated this group from other sessions and groups associated with the Work Programme that had previously been attended by the beneficiaries interviewed.

Observation

While this collaborative spirit encourages ownership and a degree of loyalty to the organisation, it is not inconceivable that the goals specified by funders might run counter to the wishes of individuals they are intended to assist. It was not clear from this work whether it was possible for group members to pivot the purpose of the project, or to choose alternative outcomes to the ones that brought it into being. This tension will be more apparent in organisations that have received funds based on fulfilling particular funder goals, which may not conform to individual's understanding of their own situation and their own wishes for the service in which they are collaborating or taking part.

ANALYSIS

Co-author reflections by Mark Brown, Social Spider CIC

It should not be assumed that individuals, organisations and funders all have the same goals or objectives.

Broadly speaking:

- Funders are concerned with ends
- Organisations are concerned with means
- People are concerned with neither

In a perfect world these three different domains may align, but in practice there are often strong differences between how individuals see their situation, how organisations that try to help those individuals see their situation, and the broader social change that funders are seeking to fund.

It can be seductive to see this as merely a matter of language and terminology. The dream is that translating funder language into the language of the average person in the street will bridge this barrier. When speaking to individuals we found that the situation was more complex than that.

People valued situational goals over intrinsic goals.
This meant that they were more likely to understand their motivations in terms of things they wanted to change about their situation rather than things that they wished to change about themselves or indeed the world at large.

People are not keen on being the subject of benign judgement, and will consequently find it more difficult to accept a goal that is based upon their deficiency rather than based in addressing a deficiency in their lives. For many funders, sustainable social change relies primarily on changing individuals. This approach is reflected in mission statements and project objectives which can, if not thought through carefully, threaten the self regard and self respect of individual beneficiaries or communities.

As consumers of services, **individuals look for ways that organisations might redress negative factors in their life and are not always initially looking at a far horizon.**
Participants also regarded different forms of organisations as having different modes of interaction with them and their wishes and desires. The tended to see their interactions with community-based non-state run organisations as being relational, in that they felt that there was reciprocity and a degree of collaboration in the form that their involvement took, meaning that they 'grew into' their role as part of the organisation rather than simply recipients of a services. State-provided services were viewed as transactional, where they chose a service based on a clear and defined set of offered outcomes.

The people we spoke to seemed to have a strong sense of what they wanted to feel and what immediate difficulties they wanted to overcome in their lives when accessing a service. They were often less able to explain exactly how a particular goal might be achieved, or to see how various goals might contribute to the completion of a larger goal.

We were keen to understand whether there might be greater alignment between the higher level goals of funders and the goals of individuals than previously imagined if the two could come together without the baggage of funder/beneficiary.

Our research suggests that **while the goals of funders and individuals are not necessarily in conflict, their starting points are different**. Our discussions often highlighted people's impulse to be interested in the specifics of a service or organisation they were accessing and what it might offer them immediately - put simply, who is running this and what will happen if I turn up? - rather than as part of a grand transformational experience such as progressing into employment following long-term ill health.

This is not to say that people do not ultimately find that services have a transformational impact on their lives - or that transformation is inappropriate goal for funders or organisations in all circumstances - but that is not something that people using services are likely to understand or be sympathetic to as an initial stated goal.

The degree of scepticism expressed by people about mission statements and their implicit (or explicit) theories of change is instructive of the ways in which organisations try to operationalise higher level goals language into deliverable guiding principles. There is perhaps a mismatch between setting the direction of activity along a linear path for individuals while the activity or opportunity itself is not experienced as linear for the individual. Of particular note would be funder goals that aim specifically to be transformational pulling the activities of funded organisations into trying to evidence transformation at the cost of individual beneficiaries understanding of their own goals and aims as situational.

The sense that we got from our interviews was that organisations as the bodies responsible for translating funder goals into user offerings were treading a ground between user desires and funder desires that may at times have been uncomfortable. As the bodies who have to translate funders' higher level goals into objectives while also delivering services and opportunities that people will want, funded organisations are trying to keep two very different constituencies happy.

RECOMMENDATIONS

This report has influenced the Impact Management Project thinking and can be summarised in the following recommendations:

1

Organisations and funders should be cautious about communicating fixed grand transformational goals in the first phase of user engagement and listen to why users are interested in the service.

2

Organisations and funders should continuously re-set their goals based on users experience and not have a set of specific outcomes as this will make users feel as though they are part of a system and will also make them concerned that they will 'get it wrong' and will no longer be entitled to the service. They are less likely to feel involved in the process as they are handing over a level of their autonomy to the service provider who is entrusted with bringing around the set outcomes.

3

Organisations and funders should slowly introduce/test a variety of (transformational) outcomes to users as these may lead to users leaping from perceiving their engagement as overcoming a situational issue to being involved in a transformational process; this could be included in the routine feedback process and in non-formal conversations with trusted service providers' staff.

4

Organisations and funders should facilitate people taking control over their participation and becoming more involved in the form of service delivery.

5

Organisations and funders can understand the outcomes their service is contributing to, but should not push users in their initial engagement with the service as most participants we spoke to did hold notional ideas of broader long term goals they would like to achieve but were not necessarily linked to their participation with particular services, especially in the initial stages of accessing a service.

6

Impact expectations should not be understood by funders or organisations as deficiencies of users but as overcoming deficiencies in the users' lives.

7

User experience does not follow a linear theory of change and thus should be reflected in an organisations of funders impact expectations.

8

Funders and investors should not be overly prescriptive to front-line organisations as this often puts these in difficult and unhelpful situations with users.

By practicing these recommendations, organisations and funders can improve their performance and continuously set and reset their impact expectations, allowing them to choose and improve the strategy for achieving those expectations and communicating their impact expectations clearly with others.

The Impact Management Project, August 2017

THE IMPACT MANAGEMENT PROJECT

Additionality

Agency

Appraisal

Appreciation

Assessment

Attribution

B Corporation

Base case

Baseline

Benchmark