Contents

1. Introduction

The Outcomes Matrix is a practical tool to help organisations to plan and measure their social impact.

It includes outcomes and measures for nine outcome areas and four lenses by which you can consider for service users.

The Outcomes Matrix aims to develop a common language regarding social investment and impact assessment in the social sector. The outcomes and measures are not intended to be prescriptive or exhaustive but should provide a helpful starting point for organisations to measure their social impact and communicate them with social investors.

The Outcomes Matrix was first developed in 2011 by Big Society Capital and New Philanthropy Capital and hosted by Good Finance.

This new release follows a review of the Outcomes Matrix so that it better aligns with key equality and human rights frameworks. The revision process has included consultations with frontline organisations and fund managers, a gap analysis to map the former matrix against other key frameworks and engagement with an external committee of equalities experts.

The key changes made were:

- Updates to the language used throughout the matrix to embed an equity lens in the articulation of outcomes and indicators. For example, switching from seeking 'equal' access to products, services and opportunities to 'equitable' access to products, services and opportunities.
- We have shifted away from the term 'beneficiary groups' which reflects an underlying passiveness, and now talk about service users to recognise the agency of individuals.
- We have also reframed this thinking to account for intersectionality and the organisations working with people with complex and connected issues. Multiple changes and additions have been made at the outcomes and measures level to embed an equalities lens.

2. Useability

Outcomes Matrix design

The matrix is designed to be an illustrative rather than a prescriptive tool. You can browse and select relevant outcomes and measures from the nine outcome areas to create your own unique Outcomes Matrix.

Outcome areas:

- Arts, Heritage, Sports and Faith
- Citizenship and Community
- Conservation of the natural environment
- Employment, Education and Training
- Family, Friends and Relationships
- Housing and Local Facilities
- Income and Financial Inclusion
- Mental Health and Well-Being
- Physical Health

Outcomes are statements of change that you want to contribute to your service users experiencing. Indicators are data points which will help you to evidence actual changes in outcomes achieved.

When considering service users, we suggest you consider four lenses:

1. People at high risk of harm, disadvantage and discrimination
2. Protected characteristics
3. Socioeconomic groups; and
4. Geography.

This intersectional approach is helpful in understanding how people may experience a combination of multiple forms of discrimination or disadvantage, and how this may affect their ability to access your product or service and achieve the intended outcomes.

This will allow you to highlight suggested outcomes and indicators which relate to specific groups.

Using supplementary resources

The outcomes matrix does not provide an exhaustive or full set of indicators for every area or group mentioned.

However, there are some proxy indicators that are illustrative of the types of challenges particular groups face. For example, an additional measure added into the Citizenship and

Community outcome area centres around access to justice for refugee, asylum and other migrant communities, to reflect the fact that members of this community face specific and unique challenges in this area.

Once you have determined the group or community that you are targeting, the Is Britain Fairer report, provides a comprehensive review of how Britain is performing on equalities and human rights and provides a complete picture of people's life chances in Britain.

This information can be used to supplement or tailor your use of measures and indicators within the matrix, to ensure you are accounting for the varied experiences of different groups.

Exporting

You can export your outcomes and measures as a PDF or Excel spreadsheet so that they can be edited and customised to meet your organisation's specific requirements.

You can add or edit the outcomes and measures in the exported document to reflect your organisation's work. This could include adding existing outcomes and measures that you already have in place or using tools from other organisations.

There are also lots of other outcomes, measures and indicator tools available online which you can use to gather impact data, including Inspiring Impact.

3. Guide to the Outcome Areas

Arts, Heritage, Sports and Faith

Organisations who provide affordable sports facilities, develop inclusive arts centres and community programmes, and preserve heritage buildings.

Can support individuals to find fulfilment, health and wellbeing in their lives, and to develop cultural skills and confidence.

Citizenship and Community

Organisations working to create thriving and inclusive communities, developing local solutions that meet local needs.

Communities can use social business models to buy community buildings, develop community spaces, and install community energy schemes that generate unrestricted income from selling energy which can be spent on local services and bringing other assets into community ownership.

Organisations whose aims are to help individuals feel they have a stake in their communities and let them see they can make a conscious contribution to them, while developing thriving places that bring local people together.

Conservation of the natural environment

Organisations that develop social business models that link environmental and social benefit by supporting renewable energy and preserving nature sites.

Helping individuals reduce their personal impact on the environment and access their natural surroundings, while increasing awareness of the importance of sustainable living for communities.

Employment, education and training

Organisations delivering education programmes, preparing students for life beyond school, connecting people with jobs, supporting young people at risk of unemployment, and providing training opportunities for people disconnected from the labour market.

Family, friends and relationships

Organisations supporting vulnerable young people, providing high-quality childcare, and helping children on the edge of care – with an emphasis on intervening early, and prevention.

Housing and local facilities

Organisations delivering specialist accommodation for vulnerable people and offering transitional housing so homeless people can make the step from temporary housing into long-term, permanent affordable accommodation. They may also help explore alternative ways of delivering more affordable homes.

Organisations can help people live as independently as possible, and provide on-going support, along with a suitable, secure place to live. They also help provide quality housing and local facilities in communities and increase the affordable accommodation in the local area.

Income and financial inclusion

Organisations that provide ethical finance, helping people buy affordable household items with affordable credit, and supporting small businesses.

They may also support people to manage their finances and access financial advice, products or services. They're also building awareness of more ethical, responsible and suitable financial services.

Mental health and wellbeing

Organisations that deliver digital and community-based support for people experiencing mental health issues and piloting and scaling preventative mental health provision.

They are helping people improve their mental health and wellbeing and develop confidence in the face of challenges.

The benefit to the wider community can be seen in the improved understanding of mental health issues, and in fairer access to quality mental health services.

Physical Health

Organisations that are developing preventative and community-based services to provide higher quality care for older people – both at home and in residential settings – and to help people stay active and well.

They help improve the quality of life for people with long-term conditions and support people to maintain healthy lifestyles and stay safe.

They also help communities become more healthy and physically active, while improving access to good quality, safe health and social care services.

4. Guide to the four lenses to consider service users

The Outcomes Matrix aims to monitor the outcomes of individuals and groups in relation to the different outcome areas.

The following section outlines how organisations can describe and understand their service users, and people whose outcomes they aim to contribute to across four components.

The previous version of the outcome matrix, referred to beneficiary groups. All the groups originally listed in that version still exist here, with some additions, under the component 'at high risk of harm, disadvantage and discrimination.' Which then now sits within this wider framework.

- People at high risk of harm, disadvantage, abuse and discrimination
- Protected characteristics
- Socioeconomic group
- Geography

Intersectional Analysis

The ways in which service users are able to experience target outcomes depends on different characteristics and elements of disadvantage. These are captured in the four dimensions listed above.

Analysing each of the four components in isolation would unlikely provide a complete and accurate picture of which service users organisations are working with and the complexity of their individual circumstances. This is where the concept of intersectionality is useful.

The starting point, or key component for analysis can vary depending on the services being offered by the organisation and the target population they are working with.

However it is always important to consider how their service users may be experiencing intersectional discrimination and/or disadvantage, and how this may influence the outcomes they are able to achieve.

Taking an intersectional approach with the four components of analysis, offers a way to do this.

The Equality Impact Investing Project defines intersectionality as:

How people may experience a combination of multiple forms of discrimination or disadvantage.

The EHRC sees intersectionality as:

"an analytical tool that we use for the purpose of equality and human rights monitoring to show distinct forms of harm, abuse, discrimination and disadvantage experienced by people when multiple categories of social identity interact with each other."

Organisations can use a similar approach to identify and analyse different outcomes taking into account the challenges their service users are facing as a result of experiencing intersectional discrimination.

For example, the outcomes matrix provides guidance to evaluate the position of service users seeking suitable employment within the outcome area Employment training and education. This looks at, for example, whether or not an individual has maintained employment, maintained employment for set time periods, has permanent employment, enjoys work, has a work-life balance etc.

An intersectional analysis can also be done by analysing the wider context of the service users an organisation is working with.

If the key component of analysis is **geographical,** then the organisation may limit their services to a particular area. What challenges exist in finding employment in rural areas vs towns and cities.

Another lens to consider would be if an organisation was working to improve employment outcomes for a group of **people who face higher risk of discrimination and/or abuse** when seeking employment.

Are there particular groups of people fairing worse, e.g ex-offenders. If an organisation works exclusively with that group, then within that group are particular demographics faring worse e.g female ex-offenders or Black, Asian or other minoritised ex-offenders?

This analysis can then also help identify both what might either limit or drive greater outcomes. For example, the above process might find a differential outcome e.g. Black, Asian or other minoritised ex-offenders are finding it harder to secure employment than white ex-offenders.

An organisation can use this insight to better tailor and target their service provision to the different groups they are working with and seek to address this disparity in outcomes.

Lense One: People at high risk of harm, disadvantage, and discrimination (Previously 'beneficiary groups')

The EHRC defines people at higher risk as:

> *An individual can be at higher risk of harm, abuse, discrimination or disadvantage if they face adverse external conditions and/or have difficulty coping due to individual circumstances.*

The basis of this list was the original list of beneficiary groups in the original outcomes matrix. A key change is the introduction of two new groups, and sub-categories, providing an additional option for disaggregation or a framework for organisations to be more detailed about their service users.

People experiencing long term unemployment	Unemployed
	Long term unemployed
	Precarious workers
	Economically inactive
People experiencing homelessness	Homeless
	At-risk of homelessness
	Rough sleepers
	Coming out of homelessness
	People living in TA
People living in poverty and/or financial exclusion	Financially excluded
	Living in poverty
	In-work living in poverty
	Eligible for benefits/UC
	Living in a high deprivation area
People dealing with addiction issues	People living with addiction
	People in early additiction recovery
	Families impacted by addiction
People with long-term health conditions/life threatening or terminal illness	Limiting long-term health condition
	Life threatening or terminal illness
	End of life care needs
	Resident in health care setting
People with learning disabilities and other neurodivergence	Autistic spectrum
	Dyslexia, dysgraphia, dyspraxia or dyscalculia
	Mood disorders

	ADHD
	Other neurodivergence
People with mental health needs	Mental health needs while independent
	Severely limiting mental health issues
	Care home mental health patients
	Families impacted by mental health issues
People with physical disabilities or sensory impairments	Visual impairment
	Hearing impairment
	Equilibrium disturbance
	Speech impairment
	Mobility impairment
	Visceral impairment
Voluntary carers	Family member carers
	Foster parents and voluntary carers
Vulnerable parents	(Effectively) single mothers
	(Effectively) Single fathers
Vulnerable children	Looked after children
	Children with experience of abuse
	Children in receipt of FSM
	Children with behavioral issues
Vulnerable young people	Youth NEET
	Youth with experience with CJ
	Resident or detained in youth custody
	Youth at risk of offending
	Care leavers/looked after as child
	Youth previously in receipt of FSM
Older People	Older people with a neurodegenerative illness
	Older people living alone/in isolation
	Older people losing independence
Ex/Offenders and prisoners	Ex-offenders
	Prisoners and detained
People who have experienced crime or abuse	Victim of domestic violence/abuse
	Victim of hate crime or discrimination
	Victim of economic exploitation
	Victim of violent crime outside home
Refugees, asylum seekers, undocumented and other migrants	Refugees
	Asylum seekers
	Undocumented
	Migrants in detention
	Vulnerable migrants
	Vulnerable EU citizens
	Forced or smuggled or trafficked migrants

Lense Two: Protected Characteristics

Protected characteristics are defined in the Equality Act 2010 and include:

Age: Refers to a person of a particular age or belonging to a particular age group. People's age may correlate with the challenges they are experiencing. For example, young people who struggle with unemployment or elderly people who face issues of social isolation.

Disability: A person has a disability if they have a physical or mental impairment that has a substantial and long-term adverse effect on that person's ability to carry out normal day-to-day activities.

ONS identifies the following categories: Vision, Hearing, Mobility, Dexterity, Learning or understanding or concentrating, Memory, Mental health condition, Stamina or breathing or fatigue, Social or behavioural and Other impairment.

Gender identity: A personal conception of oneself as male, female, questioning or non binary.

Marriage and civil partnership: refers to the legal status of being married or being a civil partner.

Pregnancy and maternity: Pregnancy is the condition of being pregnant. Maternity refers to the period after the birth, and is linked to maternity leave in an employment context.

In a non-employment context, protection against maternity discrimination is for 26 weeks after giving birth, and this includes treating women unfavourably because she is breastfeeding.

Race and ethnicity: refers to a group of people defined by their race, colour, nationality (including citizenship status) or ethnic or national origins.

Where possible, comparisons should be made between a White British group and minoritised communities.

Where possible, further breakdown between different groups is ideal, as experiences can greatly vary. Race/ethnic categories include:

- Asian, such as Indian, Pakistani, Bangladeshi and Chinese people;
- Black, such as African and Caribbean people
- White minorities, such as Irish, and such as Gypsy, Roma and Traveller people, Irish in the UK, Welsh speaking or Cornish.
- Other people not separately identified e.g. Arab or Latin American

Religion or belief: Religion is as typically described, and also includes lack of religion. Belief includes religious and philosophical beliefs as well as lack of belief.

Relevant categories for this characteristic would include: No religion, Christian, Buddhist, Hindu, Jewish, Muslim, Sikh and Other religion.

Sex: Refers to a man or a woman. These characteristics are self-identified.

Sexual orientation: Whether a person's sexual attraction is towards their own sex, the opposite sex or to both sexes.

ONS categories are heterosexual or straight; Gay or Lesbian; Bisexual; Other

Lense Three: Socio-economic group

There are a few options available for determining socio-economic background. For adults, socio-economic group can be based on the National Statisticians Socio-Economic Classification (N3-SEC). This is based on current or former occupation, plus those who have never worked or are long-term unemployed. The eight identified categories:

1. Higher managerial and professional occupations
2. Lower managerial and professional occupations
3. Intermediate occupations (clerical, sales, service)
4. Small employers and own account workers
5. Lower supervisory and technical occupations
6. Semi-routine occupations
7. Routine occupations
8. Never worked or long-term unemployed

For children, socio-economic group can be identified from the classification of adults in their family. In a school context, children in receipt of free school meals can be a proxy for families with low-paid or no employment.

Other options for assessing socio-economic status could be income levels, looking at income bands and where an individual or family's income is along national, regional or local income distributions. Another option would be to consider which IMD area people live in and use this as a proxy or indication of their socio-economic status.

The Index of Multiple Deprivation (IMD) is the official measure of relative deprivation for small areas (or neighbourhoods) in the UK. Each of England, Scotland, Wales and Northern Ireland have their own framework for determining IMD ranking. In England for example, the IMD ranks every small area (Lower Super Output Area) in England from 1 (most deprived) to 32844 (least deprived). For larger areas you can look at the proportion of LSOAs within the area that lie within each decile.

Lense Four: Geography

Geography can be considered at various levels in the analysis of service users. The first is at the country level, for the UK this will be determining if your organisations base or area of operations is England, Scotland, Wales or Northern Ireland. England can then be broken down into nine regions: North East, North West, Yorkshire and the Humber, East Midlands, West Midlands, East of England, London, South East and South West. This can break down

even further depending on the needs of your organisation. Geographical analysis can also refer to IMD area as defined in socio-economic status.

4. Jargon buster

Discrimination: the unjust or prejudicial treatment of different categories of people, especially on the grounds of race, age, sex, or disability.

- Individual discrimination concerns individual prejudicial or unfair behaviour to others based on their status or characteristics.
- Institutional discrimination is concerned with discrimination that has been incorporated into the structures, processes and procedures of particular organisations or institutions, either because of prejudice or because of a failure to take into account the particular needs of different social identities.
- Structural or systemic discrimination refers to macro-level or overarching rules, norms, routines, patterns of attitudes and behaviour in institutions and other societal structures that represent obstacles to groups or individuals in achieving the same rights and opportunities that are available to the majority of the population.

Equal access: Equality means each individual group of people is given the same resources and opportunities.

Equitable access: The equitable solution allocates resources that each person or group needs, leading to positive outcomes for all groups (not be confused with equity, which is a type of investment in exchange for a stake in an organisation).

Financial Abuse: Financial abuse often involves or is associated with: someone taking or misusing someone else's money or belongings for their own gain; harming, deriving or disadvantaging the victim; controlling someone's purchases or access to money; often associated with other forms of abuse; doesn't always involve a crime life theft or fraud.

Human rights: are universal and inalienable rights and freedoms that belong to everyone. Based on the principles of fairness, equality and respect, they reflect the conditions that all people need to both flourish as human beings and participate as members of society.

Inequality: refers to unfair differences in the extent to which different people and groups are able to realise their human rights and freedoms.

Marginalised: Marginalised populations are groups and communities that experience discrimination and exclusion (social, political and economic) because of unequal power relationships across economic, political, social and cultural dimensions.

Quality Jobs: Opportunities for work that is productive and delivers a fair income, security in the workplace and social protection for families, better prospects for personal development and social integration, freedom for people to express their concerns, organise and

participate in the decisions that affect their lives and equality of opportunity and treatment for all women and men'

Reducing inequality: is defined as lessening unfair differences in the status, treatment and outcomes of different people and groups in one or more aspects of their lives (e.g. economic, social, cultural, political and/or environmental).

*Voluntary carers***:** A person, usually a relative, parent, spouse, partner, child, or friend, who provides regular and substantial voluntary care, often in lieu of a paid care worker, to someone who is disabled, severely ill, frail or has a mental health problem.

Vulnerable: People or groups of people that experience higher risk of harm, abuse, disadvantage, and discrimination