inFocus

How can Spirit of 2012 reach project beneficiaries most effectively?

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Introduction

Background

During the 3-year evaluation of the Spirit of 2012 (Spirit) fund between 2014 and 2017 inFocus Consultancy Ltd (inFocus) reviewed documentation relating to Spirit-funded projects to analyse the target audiences that they engaged with and the extent to which these audiences were 'hard to reach'. This 4-month research project built on the findings from the 3-year evaluation to explore in more detail who grantees are working with, how and why.

Research questions

The guidance questions defined at the start of the research in July evolved across the course of the research and were incorporated into six higher level research questions that serve as the basis for the conclusions and recommendations on page 13:

1. *Who are Spirit grantees working with and why?*
2. *What are the benefits and challenges of an open vs targeted approach?*
3. *Who did grantees find more challenging to engage?*
4. *How did grantees reach their beneficiaries?*
5. *How did funders influence who grantees worked with?*
6. *How do grantees use data about beneficiaries?*

This was with the intention of ensuring that the research is more accessible for readers and, with the exception of the limitations to the right, the original evaluation questions will still be answered in this report.

Methodology

The approach to the research included the following methods, collecting mainly qualitative data:

27 Online Questionnaires

31 Telephone Interviews

Learning Event and PIE Meeting

Desk Research

The interviews and questionnaires reached **38 organisations in total** (not including the Spirit team) reaching **31 of 38 of the current Spirit grantees** (either through a questionnaire, questionnaire and follow-up interview, or more in-depth interview covering both questionnaire and interview topics), **3 previous Spirit grantees**, **3 funders/grant-makers** working in similar areas to Spirit and **1 new Spirit grantee**. The questionnaire, interview guide and workshop exercise were all developed collaboratively with the Spirit team.

Scope and Limitations

The unexpectedly high response to the interviews and questionnaires left less time and capacity available to pursue other aspects of the research:

- There was less of a focus on reviewing existing research and documentation in relation to 'hard to reach/'hard to engage' audiences with this report, with the research almost exclusively using data provided by the respondents to the research.
- The increased number of interviews with Spirit grantees also left less time to engage with other funders/grant-makers, with a slightly lower sample size than originally planned in this area. The value of the responses from the funders interviewed suggests that this would be an worthwhile avenue to explore further in future.
- It was also not possible to explore the reporting data that was submitted by the grantees in as much detail as originally planned to see what evidence was submitted regarding whether they were reaching their intended target audience.

However, the volume of data available through the interviews and questionnaires enabled the inFocus team to explore the topics in more depth than anticipated, and a change in the timing of the project also ensured that the learning event in November could be used by inFocus to explore the topic of working with partners to reach a target audience in more detail.

Who are Spirit grantees working with and why?

Spirit grantees are working with a wide range of different beneficiaries, including ex-offenders, individuals with mental health problems, disabled people, older people, inactive women and girls, young carers, BAME young women and the wider public (e.g. to engage in volunteering or to bring different members of communities together). These target audiences are explored in more detail on the following page, through the lens of more open and targeted approach to working with grantees. The level of direct engagement with beneficiaries differs across grantees, for example, while most grantees **deliver activities directly to beneficiaries**, others **provide small grants to community groups to deliver activities directly to beneficiaries**, and some **provide support to build the capacity of community groups/charities to deliver activities directly to beneficiaries**.

All grantees could provide a rationale for the need for the target audiences they were working with, with several respondents describing this in the context of discussions with Spirit to define/further refine the audience, and with a reasonably even split between grantees that used research (either conducted themselves or secondary research) and those that identified their target audience through running pilots or their existing activities (or a combination of the two)*:

Research

A number of grantees had either conducted research, or used secondary research to identify their target audience: ***"We know that there's research that says that teenage girls of secondary school age are much more likely to be inactive than boys of the same age. Our project has been working with upper primary school so 9-16-year-old girls who did little to no activity and much less than what the recommended physical activity is per week."*** For other grantees research is part of a range of actions to identify the target audience: ***"The target groups were identified through desk top research, local insight and city consolation meetings that pin pointed ad provided evidence of where and between whom the highest community tensions were."*** A number of grantees also identified that they used national statistics to identify the areas that were most in need of their services, for example, the **English indices of deprivation 2015.** One grantee described this as a kind of 'filter' in that going to a youth club in an area of statistically higher deprivation would likely lead to working with individuals in need of the organisation's services.

Existing activities and pilots

Other grantees identified their target audience through running pilots. For one grantee; ***"the programme was piloted before it was funded by Spirit and it was developed at that time with…a specialist dementia nurse service. It was looking at how to engage people in these small isolated communities who have some sort of activity once they had received a diagnosis of dementia that's often when people become very isolated for various reasons. Once we had the funding for the programme that's when decided that actually we felt it would be more beneficial for the it to be a more inclusive older people programme"*** while another grantee identified that they used a long pilot phase; ***"I don't think we initially called it a pilot at the time. It was more we had a pilot of our programme in 2011 where we were funded to work with 5 community clubs and it just so happened that One was hockey and then from that we trialled it in more hockey clubs then others were coming out of the woodwork. All the learnings we gathered from that and understanding the need/demand kind of enabled us to come up with the project and the success of the project as well."***

For other grantees, target audiences were identified through the course of running existing activities: ***"I think it's just something we've identified through the work that we already do. We were thinking that it was mostly males attending sessions and even the sessions that were meant for girls, they were a lot less active than the boys. We were also just listening to voices of the girls that we work with, they were telling us we want something for us."***

Partner Expertise

A number of grantees, especially those funding community organisations, identified the target audience through the knowledge of their partners working within communities who helped to define those individuals and groups most in need.

*Respondents were asked an open question about how they decided to work with target audiences, it therefore may be the case that grantees were highlighting the most important activity they were undertaking and their target audience could have been defined through both research and existing activities.

Open vs Targeted Approaches

The different target audiences for Spirit grantees have been broken down into the four boxes on the following page across a spectrum ranging from activities that are open to all individuals or groups within a particular location to activities that involve individuals or groups with very specific backgrounds or characteristics. This builds on and refines the categories presented in the inFocus final evaluation report in 2016. At the open end of the spectrum shown to the left (box 1) the projects funded by Spirit are open to the public, but focused on geographical areas which have been identified through research as being 'underserved' or isolated and with a focus on additional activities to try to engage with groups that face barriers to engaging in the activities. On the far right of the spectrum (box 4) the projects are focused on working intensively with a small group of participants with often complex needs from a very specific target audience. The majority of past and previous Spirit grantees that were part of the research fall between these two categories and are either focused (as shown in box 2) on a specific target audience (e.g. disabled people, inactive participants) to then engage them in activities with the wider community with the intention of breaking down barriers between different groups, while also building the capacity of their primary target audience.

The final category (in box 3) are also focused on a very specific target audience (e.g. inactive females) but are open to individuals from outside of the target audience joining the session (e.g. a more active individual taking part in a session focused on inactive people) although this is not part of the design of the project and the promotion is very specific to their target audience; ***"They are open sessions in that we wouldn't turn anyone away that turned up to a session because we want to be as inclusive as possible but we worked a lot with our partners to really target and invite young people from those more inactive backgrounds and young people from those postcode areas that fell within the high multiple deprivation. We wouldn't really turn anyone away but we were really using our partners' networks to target young people from a group of specific characteristics"*** although this was also the case with one of the organisations in box 4: ***"We always make it clear that we are open. It's a tricky one we make no bones that we exist to support learning disabled or autistic film makers. But that's our starting point and if anyone else wants to come and join then they are very welcome."***

*To some degree at least. It's unclear whether, for example, there would be flexibility for male participants to join a female project, or participants joining that are significantly outside of the age range.

Open vs Targeted Approaches: Examples

Activities are open to all individuals regardless of their characteristics or background

Activities are targeted towards individuals/groups with very specific backgrounds/ characteristics

1

Whole community

Activities are open to anyone in a particular community. There is a clear rationale for why that community itself has been selected, often because it is "underserved" in some way. Grantees will often be carrying out activities to reach individuals and groups that would traditionally be defined as 'hard to reach' to ensure they were represented within the project beneficiaries.

Examples include:

- Communities that are underserved in relation to arts/ culture
- Communities, often isolated, with high levels of deprivation

2

Connecting across difference

Activities in this category bring together two or more different groups, building connections across difference. One of these groups may traditionally be more likely to experience barriers to participation (for Spirit's funding this was often disabled people). Participant groups may have limiting perceptions about themselves or others which the project helps to challenge by fostering meaningful relationships. This may be the primary purpose of the funding, or an additional benefit.

Examples include:

- Activities that support disabled people to organise and run activities for the wider public
- Volunteering opportunities that facilitate interaction between people with and without disabilities.
- Intergenerational activities which provide shared experiences for older and younger people

3

Specific target audience

This category is for projects where there is a defined target group for the funding, and an expectation that a certain proportion of participants would come from this group. They are the focus of any outreach or recruitment. However, people from other groups would not be turned away if they registered. This type of project tends to be looking to redress an imbalance in participation levels from certain demographic groups (e.g. BAME, young people) or to have identified that some groups would benefit more from proposed activities than others (e.g. those with sedentary lifestyles would benefit more from weekly walking club than a physically active person).

Examples include:

- People with a disability (with a particular youth focus)
- Older people (with a particular focus on a certain low income community)

4

Specialised provision

More intensive activities that involve individuals with complex needs. The majority of participants are recruited via referrals and only come from a very specific target audience. Although grantees felt that their participants also needed things in their life that integrated them with the rest of society, their particular project provided a safe space for beneficiaries to participate with others who had similar experiences.

Examples include:

- Ex-offenders at high risk of recidivism
- Socially isolated individuals with mental health problems

What are the benefits and challenges of an open approach?

The tables below and on the following page summaries the benefits and challenges identified by grantees in relation to a more open approach where activities are open to all of the population within a particular location (represented by boxes 1 and 2 on the previous page) and a more targeted activities that only involve individuals or groups with very specific backgrounds/characteristics (represented by boxes 3 and 4 on the previous page).

Benefits

- **Building understanding and tolerance between individuals:** if activities are well managed, combining people together from different backgrounds can build understanding between individuals, developing friendships and relationships that they would not have made outside of the sessions; *"It's advantage is that you leave whatever your perceived label is at the door and come into a session where everybody is respected and listened to and welcome. I would see that as 100% advantage as its just treating people as individuals."* Grantees found that this understanding could be generated, in part, by individuals recognising the different contributions that individuals from different backgrounds could make: *"The strength of our approach is (that) it is inclusive because if somebody is physically frail they may be able to contribute in a different way to somebody who might have dementia but can still help organise physical activities, so it is very much that peer support is really important. So being inclusive helps support that approach."*
- **Scale:** a more open approach to engaging with target audiences also enabled grantees to expand their reach and get out to new audiences; *"The advantages are that we are inclusive, we are able to reach as many older people as we possibly can that are interested in our programme and can accept them onto our programme."*
- **Individuals do not feel singled out or stigmatised:** participants could see that they had not been singled out for the activity because of their background or certain characteristics; *"Girls that are disengaged and inactive don't feel like we were targeted for this because of that reason. They wouldn't realise the reason they were targeted"*
- **Role models:** in some projects, participants from different backgrounds could act as an inspiration for other participants, for example, inactive participants being inspired by more active participants; *"Those active people can unlock the potential of those inactive people to come and be active."*

Challenges

- **Reaching individuals that will get the most benefit from activities:** for some projects, there was a concern that a more open approach was leading them to attract participants that would not get the most benefit from the project; *"You are spreading the net wide as such and hoping you have enough positive effect"* although at the same time recognising that this could lead to a number of the benefits shown to the left.
- **Designing inclusive activities:** depending upon the audience, if the grantee is looking to involve as wide a range of individuals as possible, including those with more complex needs, activities need to be very carefully designed to make sure that participants have a positive experience. As one grantee put it; *"Inclusion done well is great, inclusion done badly is worse than no inclusion at all"*, and for another *"The disadvantages can be around how flexible our activities have to be in order to be completely inclusive. We have people in a group that are anywhere on a spectrum for cognitive and physical function…so making an activity appropriate and engaging for that broad range of people is often a challenge."* For another grantee safeguarding could also be an issue; *"It also makes safeguarding incredibly difficult, obviously in addition to having u18s from both sexes and also adults who were vulnerable adults, they need additional support."* Two of the grantees used EFDS' Talk to Me Principles to guide their sessions and others had put in place mechanisms to identify and resolve issues that might arise between participants, including access to social workers and a carefully designed recruitment process.
- **Promoting activities**: for other grantees there were challenges in communicating activities effectively, for example, to highlight that the sessions were open to all; *"On the one hand, we do have lots of people with learning disabilities come in to join as participants who like to be with their peer group but then we've also got people who come along who don't have learning disabilities and they can initially perceive it to be a group for people with learning disabilities. The challenge is to say 'no, this is a group for you - it's delivered by a person with a learning disability but it's for everybody'."* or participants feeling activities (e.g. arts and cultural projects) were not for them/not targeted at them.

What are the benefits and challenges of a targeted approach?

Benefits

- **Participants feel comfortable around their peers:** for projects to be effective participants need to feel safe and comfortable, and for some participants this was only possible in a group with individuals from a similar background or with similar characteristics. For example, for projects working with young women that may not be comfortable exercising in a mixed group; *"I do feel by narrowing it down and being quite strict with the referral programme and making them feel really special about being involved in this programme we have definitely hit out target audience and we are transforming lives."*

- **Managing risk:** for other grantees, working with a smaller, more targeted group was crucial from a risk/safety perspective, for example, for projects working with ex-offenders that needed more intensive support and could be assessed before they were referred into the project; *"The advantages of the formal referrals would be all the safeguarding, risk assessment side of things is already in place."*

- **More suitable for individuals with complex/multiple needs:** while emphasising that there were some individuals that had needs beyond the scope of the projects (see following page), working more intensively with a smaller group of participants from a similar background/with a similar set of characteristics could be more suitable for participants with more complex needs: *"My opinion is that the advantages are that we have a very high impact on the people that we do work with. We see very good levels of improvements to mental health and wellbeing. The disadvantage is that we only tend to reach a small number of people. This is always the challenge for the project at what point do you scale the project. The more you scale the more you dilute your impact. We've gone through a model where we've gone for a high level of impact on a small number of people."*

Challenges

- **Participants can feel stigmatised:** for other participants, there was a risk that they could feel stigmatised or institutionalised as a result of being grouped together with individuals from a similar background, or with a similar set of characteristics; *"I think the disadvantages is that they may feel that they are under an element of duress. It's sort of a big part of what we are trying to do with increasing mental health and wellbeing, reducing that institutionalisation which is a big factor in that, which is being upheld, I guess, in a way with the formal referrals."* One grantee highlighted the challenge of balancing specialist support with the need to engage with the wider world; *"..there is a danger of them being siloed… how can you provide specialist levels of support that is needed as well as at the same giving them the opportunity to engage and the public to engage with them."*

- **Expertise, experience and time:** working intensively with a small group of participants with complex needs can take very specific expertise, experience and time: *"… the only criteria that would be difficult for us would be if someone came along and they had additional care needs that couldn't be provided by a carer accompanying them, in a community setting we just can't support that as most of our groups are volunteer led and it would be too much to put on the shoulders of our volunteers."* One funder interviewed highlighted that there can be a reliance on a support worker (internal and external) that has built up a relationship and trust with individuals/groups that can be lost if that individual leaves the organisation, and also that it is important not to neglect the wellbeing of these workers.

- **Perception from funders:** the ratio of cost to the (smaller) number of participants, the risk of retaining participants and the background of participants, could make fundraising more challenging; *"I think it's very specific so funding can be very challenging, that group could be a niche group where part of it where if we talk about young women offending that might garner more support than a 65 year old heroin addict in a public funding or individuals or trusts and things funding. I think it also takes a lot of resource around our outreach team who do the community based work with participants."* Grantees and funders interviewed also highlighted that the significance of what can seem quite small steps with some beneficiary groups, e.g. for them to travel across a city for the first time in their lives, are not fully appreciated. This perception from funders about the outcomes achieved could be a challenge when it came to competing with other charities for funding.

Who did grantees find more challenging to engage?

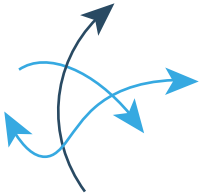
While the majority of Spirit grantees identified that they were reaching individuals that would benefit from their activities (e.g. highlighting the number of inactive participants they were reaching on a project focused on increasing physical activity) all grantees could recognise and identify that there were individuals and groups that were more challenging to engage that could potentially benefit from their services. For some grantees this was an identification of a specific group, for example, the deaf community in a particular location; *"One really good example is the deaf community in Hull. The deaf community over the years has become quite independent because they kind of have to in the absence of structures or appropriate support. A resultant factor of that is a lack of willingness to embrace and engage on someone else's terms. We had to break down that barrier a little bit. There was a lot of face to face time."* However, there were over-riding (often over-lapping) categories detailed on the following page that emerged from the questionnaires and interviews with grantees and funders, relating to individuals or groups that:

…are not engaging with mainstream services

e.g. individuals that are not accessing local authority services

…are not interested in engaging

e.g. individuals that do not see activities as attractive or 'for them'



…have multiple or complex needs

e.g. individuals that are using drugs and are at risk of re-offending

…are juggling competing priorities

e.g. NEET (not in education/ training/employment) young people that have carer responsibilities

…are geographically isolated

e.g. participants from rural communities that lack public transport options

When summarising these five categories in the content of this report the inFocus research team uses the term **'challenging to engage'**, avoiding the term **'hard to reach'** as it can be seen to carry a particular stigma*, and also because it could suggest that the term only applies to individuals that can't physically be contacted, as opposed to those that can be contacted but (often despite the best efforts of the grantee) can't be engaged to join an activity that would benefit them (e.g. if they are not interested or motivated to engage). However, this report also takes into account that some individuals that could fit into the groups above may not be the right fit for the activities run by the grantee, for example, if they had complex needs that needed intensive one to one support rather than the work predominantly in groups that most grantees use. Therefore, the key question to ask grantees in this area alongside, **"are grantees working with those who are hardest to engage?"** may be a question which emerged from the inception meeting for this research with the Spirit of, **"are they reaching those who could most benefit from the activities?"**.

A key additional question that arose during the research was also whether the activities run by the grantee were engaging/relevant for their particular target audience, that might effect whether they are interested in engaging or whether they prioritise the activity over competing priorities.

In feeding into this research, grantees also highlighted the difficult decision regarding working with individuals that could fit into the five categories above, particularly those with multiple or complex needs, where there is a higher risk that they may not have the intended impact on their lives (e.g. because they drop out of the activities) versus working with individuals or groups that do not necessarily fit into the categories above but still are in need of support and are at less risk of dropping out.

*Is There a Hard-to-Reach Audience? Public Health Reports, Vicki S. Freimuth, PhD and Wendy Mettger, MA

Not engaging with mainstream services

In the experience of the inFocus team this is perhaps the most widely used definition of 'hard to reach' in the wider charity sector and examples from grantees included; individuals that are disengaged from the school system, those not accessing local authority services of facilities (e.g. GPs or leisure centres), or those not engaging in activities within their community; *"Hard to reach demographics are hard to reach for a reason, and so we spend a lot of time on the ground visiting groups, working with specialist health services, trying to reach those older people who don't access services or other groups and activities".* One grantee described this as the individuals beyond the those their partners (e.g. youth centres, schools) worked with, as these individuals were already *"on the radar or in the care of someone"* even if they still had unmet needs. This lack of engagement could be for a number of reasons, including those on this page, or a lack of confidence or trust.

Lack of interest

For a number of grantees, it could also be difficult to engage with individuals that were not motivated to take part in activities; *"The very inactive as opposed to the moderately inactive have been the hardest to engage as a proportion of them just do not have any interest in joining a physical activity session."* These individuals could also/alternatively see an activity as unattractive or 'not for them' (e.g. volunteering, or in one example from a funder, a drumming project with people with dementia, although the project did make adjustments and recruitment went up).

Multiple/complex needs

Some participants with more complex needs, for example, individuals that are using drugs and at risk of re-offending or multiply excluded from school. These individuals could be challenging to engage and keep engaged; *"The really obvious one is participants with 'chaos' in their lives. You could have gone through a lot of work with the referrer but the person, because of the very nature of where they are as a participant, might, you might lose them before you've actually engaged with them or you might engage with them once and decide they aren't ready."* For many grantees, the majority of whom run sessions for groups of individuals rather than providing exclusively 1 to 1 support (so needed to consider the needs of the overall group and how the behaviour of individuals could effect this), it was not possible to work with individuals that needed this more specialist support through their activities; *"I suppose in the context of people who would engage with the criminal justice system and would be most at risk either people with very serious mental health disorders or people who are at immediate risk of offending especially in NI where they may be involved in para-military activity or be coerced into that. I think that is a very hard group to reach with this sort of activity, they obviously make up a minority of the criminal justice system anyway. I would say people at that very far end of the risk spectrum probably wouldn't get very much out of the activity either….you'd be looking at clinical mental health support or criminal rehabilitation support which are two things that are provided as a statutory service. Whether or not they are provided very well is another question."*

For some individuals with complex needs, there was also a challenge with getting buy-in from support-workers or carers of their target audience that acted as 'gate-keepers' to reaching the individual; *"Certainly, at the first stage we do have problems recruiting because one the challenges of engaging people with learning disabilities and autism they are very reliant on their support networks. So if the support networks aren't behind their involvement its more of a challenge."*

Juggling competing priorities

For some participants there are other priorities in their day to day life that may compete with their time and energy. This could include, for example, include; *"Post school leavers from poorer areas who have carer or young child responsibilities"* or multiple issues such as *"health situations, poor financial situations, unhealthy family and relationship situations. Even if the young person is keen and willing to engage consistently, these things will prevent them."*

Geographically isolated

For a number of grantees working with rural communities, a lack of public transport could also be a significant barrier; *"…we've got 7 outlying villages that are quite far out they range from about 5 miles to about 20 odd miles. Trying to reach the inactive girls who are 20 odd miles away but still a part of your focus when there isn't really a public transport system in place is a challenge. After they finish school they go home and they can't go back into the town."*

How did grantees reach their target audience?

Grantees engaged in a number of activities to reach their target audiences, with partnership working the most common response (to an open question on this topic) by a significant margin. This resulted in the initial selection and engagement of the target audience often being 'one step removed' from the grantee, which caused a number of challenges (see overleaf). A significant number of respondents also used social media and outreach activities directly with their target audience, while others used 'community champions' to recruit participants. Grantees also identified 'word of mouth' as key to their success in recruiting participants although this is not included below as the focus is predominantly on the actions taken by the grantees themselves to reach their target audience:

Working with partners

All of the grantees interviewed identified that they worked with other organisations in some way to reach their target audiences, both through formal referral partnerships where participants were directly referred into the grantee's activities and less formal arrangements to promote services. This included a range of partners that engaged directly with the potential target audience:

Statutory referrals from key support organisations in the criminal justice, homeless and substance abuse sectors

- Other charities and groups working in the voluntary sector
- Schools and colleges
- Jobs centres
- GPs, dentists and health services
- Community shops (e.g hairdressers), village hall, churches and faith centres

"About 40% of referrals will come through social work, criminal justice teams and other social work teams, we then work with housing associations and other third sector and charity partners like women's aid and other smaller organisations who are possibly working in a niche, they might work with women with alcohol problems or women in a specific area."

Social Media

A number of grantees could demonstrate success in using social media to reach their target audience, often in combination with other activities; *"I think that social media outreach is our biggest source of recruitment for young women. Our fitness coach tends to speak to people via our Facebook page then invite them in. We found that meeting young people in their local area helps, so maybe they don't want to come to the leisure centre they've not been before they feel intimidated ok so can we meet them for the first time in McDonalds, buy them a coke have a chat tell them about the programme. We've also found that if they come with a friend they tend to be more likely to sustain."* For another grantee it was the most important recruitment activity: *"We recruit through partner agencies like the job centre ..but social media remains the number one source of engaging young women."*

Outreach Activities

Many of the grantees also went out into communities to directly engage with participants through a range of different activities, from handing out flyers and putting up posters, to providing taster sessions and roadshows, and directly contacting parents and carers.

Community Champions

Some grantees also worked with key individuals (both internal and external to the grantee) that had local connections to conduct outreach. These were individuals that were embedded into, and trusted by, their community and understood how to engage with those in the target audience that were not engaging with mainstream services. Several of the grantees called these individuals 'community champions'; *"We are recruiting 35 Community Champions aged between 14-25. They will be the voice of the communities as they will be from communities that are being targeted and it's about how we use them to get into resident groups."* For another grantee community champions were critical for reaching audiences they had found challenging to engage; *"We know that there are communities that are undersubscribed in proportional representation. One example would be the Polish community; Hull has got a fairly new identifiable, geographically socially measurable, Polish community. Typically, they are quite under represented. So what we did over time was we identified and engaged a community champion, a really proactive individual, multilingual, passionate about the Polish community, passionate about volunteering, passionate about culture and we employed them to be that real route into the community to do a bit of targeted work. She became this gateway."*

Reaching beneficiaries through partners

As described on the previous page, all grantees worked through partnerships to reach their target audience, utilising the connections and expertise of partners within their communities. The learning meeting with Spirit grantees on the 8th November provided an opportunity, in combination with the feedback in questionnaires and interviews, to further explore the challenges and advice on working with partners to reach potential beneficiaries shown below:

Challenges with recruiting through partners

- Partners referring participants that were outside of the target audience, in some cases due to the partner not being able to effectively communicate the activities accurately to potential participants.
- Partner staff lacking capacity; *"I suppose the barrier is sometimes the worker themselves are so under pressure that maybe they take some time to get back to us. We are really good at reaching out to them, but whether they take us up on the session or the courses that we can deliver really is up to the worker…If they are super stretched and super busy and don't get back to us for weeks they might miss out on that opportunity."*
- Ongoing communication with the partner; *"Occasionally we would turn up for a course and the worker maybe didn't have time to communicate it properly to people and turnout was low which is a shame as we know there is that demand for it within that group or organisation and yet the communication internally hadn't been good."*
- Partner staff that were not fully engaging with the ethos of the project and restricting access for participants and pre-existing attitudes/stigma towards the target audience: *"I've stood up in rooms presenting to clubs and had challenges back around 'you can't trust younger people to volunteer because they're only with you for a short amount of time then they are gone' so there's a stigma that we have to overcome with some clubs and partly that's been working with them through the pilot then we have examples that prove it has worked successfully."*

Advice on working in partnership to recruit participants

1. It is important for the grantee to ensure that they have considered the time and resources it will take to build the partnership and to take on the individuals referred by the partner (or to provide clarity if there is a limited number of places available for participants).
2. Grantees need to ensure that the potential partner is working with the right target group before starting with them on the project, learning as much as possible about how they engage with target audiences and whether they have the knowledge, awareness and capacity to engage with the most suitable target audience.
3. Finding a mix of partners is key, both to make use of different skills, approaches and experience and also to ensure that there is not an over-reliance on one partner.
4. When first meeting with the partner it is important to make the case for working together and how the project can help them (e.g. what the outcomes for participants will be, how it aligns to their objectives). It is key also for the grantee to demonstrate their own track record and share their successes (e.g. through case studies).
5. It is important to ensure that the partner has a detailed understanding of what the project involves, the profile of the target audience, and how to effectively communicate this. In this respect it can be useful to find a 'champion' that is enthusiastic about the grantee's project within the partner's organisation.
6. An agreement in writing at the outset of the partnership can help to clearly set out the roles and responsibilities of both parties. It is is important to be realistic and pragmatic over what the relationship will involve in time and resources.
7. Once the partnership starts regular communication and in-person interaction (as often and early as possible) can help to build the relationship.

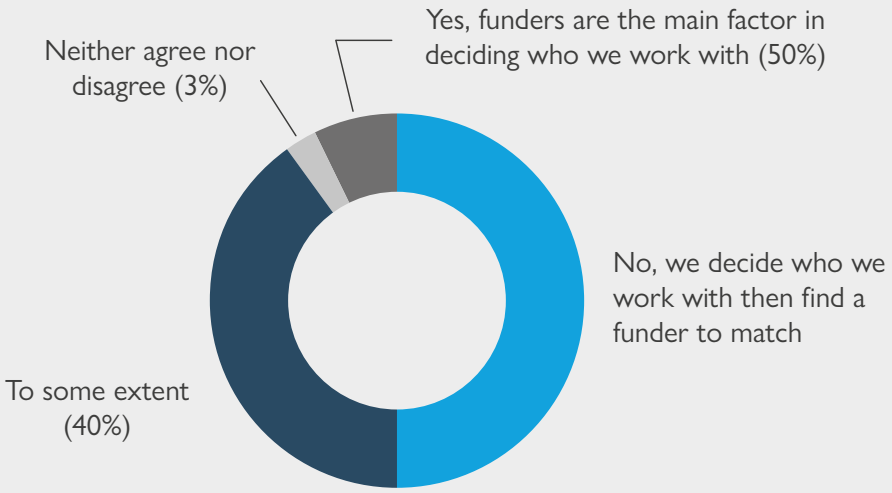
How did funders influence who grantees worked with?

A key question to answer through the research was the extent to which grantees felt that they were influenced by their funders in deciding which individuals or groups to work with, both with in relation to their Spirit-funded project and their wider work. The majority of grantees that responded (30 out of 35) identified that they were not influenced by a funder, although a large number also had some flexibility for funders to influence their target audience. Only two grantees identified that funders were the main influence in deciding who they worked with. More details on the first two categories follows below:

No, we decide who we work with and then find a funder to match

The majority of grantees were clear that they decided as an organisation which individuals or groups they worked with, rather than the funder being the main influence. For some grantees this was about taking an evidence-based approach to the need within communities, designing programmes to match this then afterwards looking for funding. A number of grantees also identified that they were driven firstly by their strategic priorities/objectives/mission/core purpose and the target audience in relation to this; *"we wouldn't look to a funder that didn't align to our strategic aims. The majority of funders that we work with are starting to change their approach slightly. In the past it may been very specific groups, but now there is more flexibility - especially as so many target markets overlap."*

Thinking about all the activities you run within your organisations (rather than only your Spirit-funded projects) to what extent do you feel that your funders influence which individuals or groups you work with?



Our funders influence who we work with to some extent

For other grantees (9 out of 24), funders did have an influence on who they worked with to some degree. This could be with a more specific breakdown of a target audience; *"we always work with young people in disadvantaged areas, and facing personal barriers, aged between 8 and 25. However usually it is the funder who has a strong influence over the specific age range, and particular characteristics of disadvantage that they want to target (e.g. postcode deprivation, NEET, refugees)."* the location in which to work: *"Yeah they do in terms of overall as a charity they influence the locations that we work in and the target we have around female participation on this fund."* or general ideas about who to work with: *"ideas can come from funders but generally we look for funding that will be appropriate for the planned project/idea."* One grantee emphasised taking a considered approach when deciding which individuals or groups to work with: *"As an organisation, our primary target group is young people, secondary is their parents/guardians and their communities. Funders do influence specific target groups according to the outcomes of the project we have applied/been commissioned for. However, this is carefully considered by our organisation to ensure we have the skills and expertise to deliver e.g. inter-generational is a new area, but one we have capacity and resources to develop through existing programme experience and working with other partners who may have expertise we don't have."*

Grantees were also asked the extent to which the input from funders was helpful in deciding which individuals and groups to work with. Some respondents chose to answer the question more generally while some responses related more specifically to working with Spirit. Fifteen grantees responded in total, with the results shown below.

Yes, we found the input from funders helpful

The majority of grantees found the support from funders helpful overall in deciding on which individuals and/or groups to work with. This included support with helping to understand the target audience, ideas for both broadening the target audience (in one instance) narrowing the target audience (in another instance) and generally challenging decisions about who to work with in a positive way: *"Spirit in comparison to other funders have been fantastic in relation to supporting us to reach the least active because it's been a focus on quality of engagement as opposed to bums on seats. That's really helped us to think about not being sort of stressed with high numbers in terms of participation rates but thinking about that quality of engagement and how we can reach those who really need activity the most. They are doing that already so no doubt more of the same would help other partners to reach that audience."* Another grantee found Spirit approachable for advice; *"We've been doing this for 15 years and I think we are good at reaching target audiences. But if I had any problems I do feel like I can go to Spirit and get a little bit of advice."*

Inputs from funders

For one grantee, input from funders could be unhelpful when a funder is very specific about a target audience that the grantee does not specialise in working with: *"It depends. It's rarely 'helpful' because our target group is so wide anyway that a funder doesn't help up engage new audiences. But it's not often 'unhelpful' either because funders usually listen to us when we say that an idea they have is unrealistic…The only time it's unhelpful is when a funder is very specific e.g. NEET young people, and we therefore we deliver a NEET-specific programme without being an actual NEET-specialist. In this way, we respond to the funders' specificity with enthusiasm to deliver to our best ability and persuade them that we'll do a good job in that area, yet we're not actually specialists in how to work with that type of group."* For a second grantee the influence from funders could also be unhelpful: *"I don't feel they influence who we work with but perhaps how we work with them, and the focus of the work. I feel that this influence can be unhelpful."* For one grantee, the input from funders had been both helpful and unhelpful: *"This has been both helpful and unhelpful in different aspects. As a community organisation in an area identified as having additional poverty, we already have a captive audience and a busy young programme where the needs and issues of young people are endless. Targeting those specifically inactive has been a tough sell, and in hindsight wasn't the best approach for us and our young people. However I do feel that non-community based organisations benefit from targeting specific groups, especially those going into schools etc."*

A Funder Perspective

All three funders interviewed had a similar approach to Spirit in working with their grantees, offering advice and support to help to grantees to reach their target audiences. In particularly, all of the funders highlighted the need for flexibility from funders to support grantees with changes to the design of projects and who they are working with based on their learning, moving away from a rigid approach to comparing numbers of outputs and outcomes towards understanding the quality of outcomes (and recognised the time and risk to working with individuals and groups that are harder to engage).

Two of the funders held collective learning events, similar to Spirit, bringing together grantees to explore who they were working with and how they could make improvements to their recruitment practices.

For one of the funders, while they asked for evidence of who the participants work with and why they feel their audience will be particularly hard to engage with, they were not sure how much weight their grant managers would place on this information, and that this would vary across their team. They also felt that they were not as good at pushing and challenging grantees on who they were reaching once the project started and that this was primarily based on trust.

How do grantees use data about beneficiaries?

The majority of grantee collected both basic registration data (name, age, gender, ethnicity, disability, post-code) with a baseline questionnaire that questions mandated by Spirit. Additional data collected by participants included complex barriers and support needs and data specific to their target audience (e.g. volunteering experiences or interest and levels of physical activity). Grantees were also asked what data they collected about their participants in registration forms or other baseline tools and to what extent, and when, they used this data to make decisions about recruitment. All but two of the grantees that responded to the question used their data in some way to decide who to work with, although for the majority this was not used to decide who to work with at the outset of the project, rather to look back reflectively at whether there were particular groups that they were not engaging with.*

Using data to decide whether or not participants can access the service

Only grantees that were working towards the right of the Open vs Targeted spectrum on page 3 and engaging with individuals with very specific backgrounds/characteristics identified that they used data during the registration process to decide who to work with, and for two of the grantees this related to individuals referred to them from partners (so there is no face to face engagement): *"We have huge number of paperwork and forms because a number of different funders require different levels of paperwork. We have a referral form which a partner will send, this will have data about the participant on it that will be more a tick box exercise to determine their eligibility."* A number of grantees specifically ruled out this approach as it would not fit in with an inclusive ethos: *"We wouldn't eliminate anyone we probably just wouldn't count them towards the KPIs because it is about bringing communities together. Those beneficiaries are the one that have been specifically highlighted where there's tensions locally in the wards that they are working in."* or it would be difficult to go back to a referral partner: *"We kind of felt that by week two we couldn't go back to the schools and say 'you haven't given us the right target audience and take the girls out of the session but we've just used it to our advantage as I've said before."* Several grantees and one funder interviewed highlighted that collecting data at the outset of the project could be a barrier to entry: *"I didn't collect data on them as such I just got their school referral. We didn't sit down and do the survey with them until we had got them recruited on to the project, to do the evaluation for the project. So we didn't do that with them until week two, we didn't want to scare them away."* and for another grantee; *"No, no you could be from anywhere in the city and not tick any boxes but we don't put any barriers up for them."*

Using data to identify gaps in target audience

The majority of grantees interviewed did use data for reflecting back on who they were reaching and identifying if there were individuals or groups that were underrepresented in their activities: *"It helps us identify the 'cold spots' of our recruitment. e.g. In our latest wave of recruitment we targeted e.g. the Polish community, because we were able to see from reviewing our previous applications, and cross referencing with city data, that Polish communities were either undersubscribed, or they showed evidence of heightened attrition post-initial application."* For some grantees this means communicating back to referral partners: *"Our pre- and post-participation evaluation questionnaires confirm that we are working with the most needful participants in terms of the impact on improved mental health. We are in ongoing consultation with referral partners to confirm our recruitment targets match need and suitability to participate and take advice on new groups of beneficiaries we could work with."* For one grantee, it was also important to use observation and other tools to help verify the accuracy of the information provided: *"As the lead partner we use this information to check and challenge reach to the right participants (we also encourage partners to use in the same way). However, need to be mindful that participants aren't always honest on their registration form - tend to under-report impairment and over-report activity levels. We use observations and other tools to help triangulate data sources"*

**the recommendation to explore when grantees used their data came from the Spirit PIE meeting in September 2018*

Conclusions and Recommendations

1 Who are Spirit grantees working with and why?

Conclusions	Recommendations
The findings from the research helped to further refine the findings from the 2014- 2016 evaluation regarding the overall approach that grantees are taking when deciding the limitations of who to work with across a spectrum of working with all individuals in a particular area that is identified as isolated or 'underserved' through to organisations working with a very specific target audience. The majority of grantees fell in between these two categories, either working with a specific target audience with the intention of engaging that audience with the wider public, or focusing on a specific target audience but with the option (to some degree) for anyone to join outside of the target audience to also attend. In general, Spirit grantees are working with a wide range of target audiences across the UK, with different levels of engagement from directly engaging with their beneficiaries through to providing small-grants or capacity building support. All grantees could give a basis for why they were working with a particular target audience, predominately through research or existing activities/pilots, although it wasn't possible to dig deeper into the evidence for this from each grantee in the scope of this research.	• The Open vs Targeted spectrum shown on page 3 could be a useful lens through which to prompt a discussion with grantees on the extent to which their activities are open to all or targeted at specific individuals and groups. This will help to ensure that they have fully thought through their approach and the corresponding advantages and disadvantages. This can also impact on their approach to monitoring and evaluating their activities under the Spirit grant, for example, those towards the more open end of the spectrum are likely to be more concerned with changes in perception within their groups and wider society. • It wasn't possible to identify the extent to which there was evidence behind the rationale that each grantee gave as to why they worked with a particular target audience. It could help to decide as a Spirit grant-making team whether there could be minimum standards of evidence (although not described in this way to the grantees) behind the grantee's identification of their target audience, e.g. that they identify the specific research used to make this decision or there is an assessment of the relative strength/relevance of the knowledge demonstrated by the grantee (that they could clearly give reasons as to why the target audience is a priority).

2 What are the benefits and challenges of an open vs targeted approach?

Conclusions	Recommendations
Grantees could clearly articulate the benefits and challenges of an more open vs a more targeted approach and give a rationale for where they fitted on the spectrum and in what circumstances a more open or targeted approach would be more suitable. Which approach to take was very much dependent on the context in which the grantees were working and the type of activity they were running (for example, inactive programmes may be more suited to a more open approach, working with those at risk of reoffending may fit a more targeted approach) and there were some key factors to consider with both approaches. For those taking a more open approach it was interesting to explore how inclusive they could be with their approach to include those more challenging to engage (see question 3 below) while for those taking a more targeted approach there was a much higher risk both in relation to the perception of the project and not achieving outcomes for individuals due to smaller numbers and participants that were more likely to be challenging to engage/keep engaging.	• As above, working with the grantee to think through the advantages and disadvantages of a more open vs more closed approach could help to positively challenge their model and whether it is the best approach for a particular target audience. In particular, those with a more open approach could consider to what degree they could engage with those that are more challenging to engage (see question 3 below), what resources and expertise this would take and whether it is appropriate for their target audience. • There is clearly no right or wrong approach across the Open vs Targeted spectrum and having a variety of projects across the spectrum has clearly helped to identify learning for the Spirit team and grantee network. With the majority of projects taking a more open approach it may also be worth the Spirit team considering whether there is the right mix in the grantee portfolio across the spectrum and, for example, whether there could be more projects on the far right of this that will most likely be working with the hardest to engage.

3 Who did grantees find more challenging to engage?

Conclusions	Recommendations
All grantees and funders interviewed were open and self-critical regarding the individuals and groups that they found challenging to engage and while some responses were quite specific to a particular community (e.g. the deaf community in a particular city) there was convergence across 5 categories; those not engaging in mainstream services, those with a lack of interest in engaging, those with multiple or complex needs, those juggling competing priorities, and people who are geographically isolated. Reflecting on these different areas, the inFocus team use the term 'challenging to engage' as this better reflects that grantees can physically be reached but may still not engage in the project (e.g. because of a lack of interest). It is also important to reflect that not all grantee could or necessarily should be working with all of these groups as some activities may not be suitable or appropriate for individuals across the 5 categories, and/or the grantee may not have sufficient capacity and expertise to work with them (while still having a significant impact on groups that would not fit into these categories but still need and benefit from support).	• We recommend considering the target audience at two levels, firstly, the individuals/groups for whom the grantee can evidence a particular need for their services (e.g. women and girls, BAME, inactive young women or older people with dementia) in their area and secondly those that are more challenging to engage within this group across the 5 categories to the left. This could then form the basis of a discussion with the grantee to look across the five areas and identify if the grantee is taking action to reach these individuals or groups (and if not, why not) considering the three questions: 1. would individuals or groups in these categories benefit from the grantee's activities, 2. does the grantee have sufficient capacity and expertise to work with them? and 3. Are the activities suitable to reach these audiences. The spirit team could then potentially explore with the grantee how they could offer support to reach these groups (if the answer to the two questions above is 'yes'), for example, through additional funding, expert support, peer to peer support from other grantees. • The five categories could also be used as a basis for future Spirit learning event topics, exploring solutions and best practice for engagement across the five categories.

4 How did grantees reach their beneficiaries?

Conclusions	Recommendations
All grantees used partners to some degree to reach their target audiences, from informal arrangements to promote the grantee's activities through to formal partnership agreements to refer participants into their projects. A deeper exploration in this area highlighted how critical this was to many grantees but also the challenges with this approach, primarily that the selection of the target audience is one step removed from the grantees in these situations and, as grantees rarely turned away participants, lead to participants joining that were not the best fit for activities. Many grantees went beyond this to conduct face to face outreach in their communities, with several having particular success using 'community champions' that understood and were trusted in their communities. Several grantees also found social media effective in reaching their target audience.	• Grantees clearly all see the benefit in using partners to reach their target audience, however, there are limitations and challenges with this approach (see page 9) that could form the basis of a discussion with a grantee about how best to work with partners to reach the target audience that is most suitable/that would most benefit from their activities. This could include exploring to what extent the grantee has taken steps to support the partner in identifying the most suitable target audience. • Exploring the extent to which grantees are using outreach activities to reach those most challenging to engage (if appropriate for their context) could also help to (positively) challenge the extent to which they are engaging with individuals in the 5 categories in question 3 above. Even grantees to the far right of the Open vs Targeted spectrum that were recruiting mainly with statutory referrals highlighted how important it was to still conduct face to face outreach. • Grantees also have a lot of experience and advice about how to reach grantees, for example, through using social media or Community Champions. Creating and sharing short case-studies in relation to this could be helpful for grantees to adopt new approaches.

5 How did funders influence who grantees worked with?

Conclusions	Recommendations
The majority of the grantees identified that they would not be influenced by funders in deciding on who to work with, as this would be based on their strategic priorities and the need in their community. However, there were a significant number of grantees that felt that they had been influenced by funders to some extent, usually to help to refine an existing target audience (e.g. to reach a specific age group, gender or ethnic group), and generally grantees found the support from funders helpful in this respect (as opposed to funders pushing their grantees towards working with a target audience outside of their area of expertise). Several grantees specifically highlighted Spirit's flexible approach to adapting the target audience over time in response to learning, and the funders interviewed all identified this as an important factor to supporting grantees to work with their target audiences (e.g. through one to one advice or learning events).	• As there was an appreciation from a number of grantees for Spirit's advice and flexible approach to their reaching their target audience, which all three funders interviewed also felt was good practice, it would be worthwhile to continue with this approach (while always being cautious if the target audience being proposed is suitable for the grantee). • It may also help at the application stage to ask about/look further into the experience of the applicant in working with a particular target audience to ensure that they are not stretching their activities too far to work with a particular target audience that does not relate to an identified need in their community. • There was clearly an appetite from the, admittedly small, sample of funders involved in this research to explore the questions on which this research is based and some interesting areas of convergence with Spirit on how these funders assessed and supported grantees to reach target audiences. Spirit may want to consider taking the lead in bringing together funders in the UK to discuss these issues further and agree/document a common approach (e.g. through a learning event or community).

6 How did grantees use data about beneficiaries?

Conclusions	Recommendations
The majority of grantees combined the collection of basic registration data with baseline questionnaires (that would usually include items identified by Spirit) and (for many grantees) data specific to identifying their target audience (e.g. activity levels or employment status). However, it was less evident whether grantees were collecting data that could specifically identify whether individuals were necessarily the hardest to engage (based on the 5 categories in question 3 above). Following the PIE meeting with the Spirit team in August 2018 the focus of this aspect of the research switched to exploring the question of when grantees used the data. Only a small number using their data to decide whether an individual could access their activities, for some because this would create a barrier to entry, while the majority used their data to reflect back on whether they were reaching the right target audience.	• There could be additional questions in the application process that relate to the 5 categories of the 'challenging to engage', for example, asking applicants who they find most challenging to engage, or more specifically whether they plan to engage with individuals with complex needs or that are disengaged from mainstream activities (although there is a risk that this might push grantees to work with individuals that may not be suitable for their activities or levels of expertise/experience). • It may also be worth exploring whether there could be additional standard questions that grantees could ask about their beneficiaries alongside wellbeing and disability, for example, asking about the extent to which they have engaged in other services, or questions that explore complex barriers and support needs (as in an example from one of the grantees). • Grantees might also benefit from guidance around the point at which to collect data from beneficiaries, to avoid the risk of creating a barrier to joining activities for some grantees. • Grantees could also be bought together (e.g. in a training or learning session) to explore good practice in how to review data to understand which individuals and groups they are not working with, as there is clearly enthusiasm from grantees for this approach.

Appendix A: Original Research Questions

The research questions defined at the start of the project are shown below. The questions were replaced by the 6 higher level evaluation questions included throughout this report.

How can Spirit get a better understanding of who grantees are reaching, given challenges of underreporting and overreporting?

- What is the profile of the individuals that each Spirit grantee is engaging with? [1]
- What registration and baseline data does each Spirit grantee collect? What are the similarities and differences in the data collected across grantees?
- What is the understanding of each Spirit grantee of 'hard to reach' audiences? What data do they collect to identify these audiences?
- Are there participants that Spirit grantees would like to reach, but find challenging to engage? What are the challenges they face in engaging with this target audiences? [2]

In what circumstances is an 'open to all' policy the best way of reaching those who are most in need, and in what circumstances should places be filled only by individuals from a particular disadvantaged group?

- Does primary data collected directly from Spirit grantees validate or modify the three different approaches identified by inFocus from the secondary research in 2017: 1. open to all, 2. exclusively engaging with a well-defied target audience and 3. targeting specific intermediary organisations to build their internal capacity to effectively address barriers to engagement?
- What is the motivation of Spirit grantees in taking a particular approach to engaging with their target audiences? What is the thinking/evidence behind the approach? What benefits do they feel will come from the approach and do they have evidence for this?
- For those adopting an open access approach, what steps are being taken to engage with individuals that are 'harder to reach'?
- Is there an understanding of the 'trade-off' between open access vs more targeted approaches?

How can projects use their baselining and ongoing registration process to make adjustments to their recruitment and retention of those that are most in need?

- What process do Spirit grantees follow to recruit and enrol participants? How does the baseline or registration process support this process? Are there good practice examples of this from grantees, and/ or from the wider sector?
- How can grantees improve selectivity and enrolment of target audiences into their programmes?
- What approaches and good practice can be drawn from the wider sector, for example, the recommendations for measuring wellbeing from the Measuring Wellbeing Inequality, Working Paper on the Selection of a Headline Indicator from the New Economics Foundation?

How can we provide better support and challenge to projects so that they keep a relentless focus on meeting those who are most in need?

- What practical actions could Spirit take to encourage grantees to think about who they engage with and how?
- What is the approach of other UK-based funders to their grantees reporting back on their target audience?

[1] This would build further upon and expand the previous grantee analysis in Excel that sat behind the 2017 final evaluation report.

[2] For example, the team at WOW Spirit Bradford identified that they faced challenges engaging with white working class women, and they felt this may have been because a cultural festival was not something they would feel is relevant to them.

Grantee Target Audience: A Guide for Spirit Grant Managers

1 Designing

- To what extent has the grantee defined the need for the target audience? e.g. through research and/or their own activities?
- Where does the grantee fit on the Open vs Targeted Spectrum and have they considered the advantages/disadvantages of different approaches? How does this impact on their approach to M&E?
- Would individuals or groups that are harder to engage (from the 5 categories) benefit from the grantees activities?
- If yes, does the grantee have sufficient capacity and expertise to work with them? Is there any support that Spirit could provide in this respect?
- What data could they collect that would help to identify individuals that are harder to engage?

2 Promoting

- Is the grantee using partners to promote their activities? Have they considered challenges with this approach and steps to address this?
- Is the grantee conducting outreach activities to reach participants that are less engaged in mainstream services? Are there activities they could conduct in this respect?
- Is there the potential to use 'community champions' within their approach?

3 Joining

- At what stage is it best to collect data from the participants (so as not to create a barrier to entry?)
- To what extent is it possible for participants to join from outside the target audience? Are there any limits to this?

4 Running

- Is the grantee planning to review their data and assess whether they are reaching the right target audience?

5 Closing

- What steps has the grantee taken to record and share their learning and apply it to their wider organisation?

This guide covers a series of questions that you can go through in a 90-minute session with your grantees to explore their approach to defining and reaching their target audience. The aim of this guide is to ensure that the grantees are reaching those individuals and groups that will get the most benefit from their activities. The guide is based on the feedback of grantees, Spirit staff and other funders in the UK, summarised in the report: "How can Spirit of 2012 reach project beneficiaries most effectively?"

1 Designing

- **To what extent has the grantee defined the need for the target audience? e.g. through research and/or their own activities?** This question seeks to explore and dig deeper into the extent to which there is a clear rational and evidence for working with a particular target audience. This could come from the experience of the grantees, either through their day to day work or specific pilots, or from research (either conducted by the grantee or secondary research). It is advisable to get into more specific detail here with the grantee i.e. exactly which research or experience.

- **Where does the grantee fit on the Open vs Targeted Spectrum and have they considered the advantages/disadvantages of different approaches?** How does this impact their approach to M&E? The Open vs Targeted diagram shown on page 4 is intended as a useful lens through which look together with the grantee and explore where they fit on the chart and the degree to which they have fully thought through their approach and the corresponding advantages and disadvantages. The approach they take can also determine their approach to M&E and what they will be measuring, for example, those towards the more open end of the spectrum are likely to be more concerned with changes in perception within their groups and wider society.

- **Would individuals or groups that are harder to engage (from the five categories in the report) benefit from the grantees activities? If yes, does the grantee have sufficient capacity and expertise to work with them? Is there any support that Spirit could provide in this respect?** This relates to the categories identified in the report for individuals that are hardest to reach because they are; 1.not engaging with mainstream services, 2. are not interested in engaging, 3. have multiple or complex needs, 4. are juggling competing priorities and 5. are geographically isolated that are hardest to engage. Not every grantee will engage with individuals or groups from every category (e.g. individuals with multiple or complex needs) but it is important to understand the rationale for why they are not engaging with each category (and if you feel there is more they could be doing to engage these audiences). If the grantee is engaging, or planning to engage, with individuals with complex needs it is also key to explore what experience or expertise they have to do this (through their own organisation or in partnership).

- **What data could they collect that would help to identify individuals that are harder to engage?** It could be helpful for the grantee to ask additional questions as part of their registration process that help to identify individuals from the five 'harder to engage' categories, for example, the extent to which they have engaged in other services, or questions that explore complex barriers and support needs.

2 Promoting

- **Is the grantee using partners to promote their activities? Have they considered challenges with this approach and steps to address this?** Working in partnership is an effective way of reaching target audiences for many grantees, however, there are also clearly issues with using partners to reach the target audience if the approach is not carefully thought through and carried out (see page 10 of the report) e.g. being referred individuals outside of the target audience. This question is intended to identify the extent to which grantees have thought through their approach in this area and how to mitigate any challenges that arise – it could be useful to talk the grantee through the points on page 10 in relation to this.

- **Is the grantee conducting outreach activities to reach participants that are less engaged in mainstream services?** Are there activities they could conduct in this respect? Based on feedback from grantees, 'outreach' and going directly into communities to recruit participants is important to engage with individuals or groups that are 'harder to engage'. It may be that not every organisation has the resources to do this, or may just work with referrals from partners, but it is important to understand why they are not taking this approach and explore whether they could do this as it may be difficult to engage with certain target audiences without it.

- **Is there the potential to use 'community champions' within their approach?** This relates to the approach of using individuals who are embedded and connected in their communities to recruit participants (as staff members or as partners). This may not be viable for the grantee but other grantees have found it effective and there are examples that could be shared with any grantees that are interested.

3 Joining

- **At what stage is it best to collect data from the participants (so as not to create a barrier to entry?)** For some (but not all) grantees, collecting data from individuals when they first attend an activity can potentially create a barrier to that individual to continue to attend, for example, if they have had negative experiences with institutions that have asked for similar information before. This question therefore may not be relevant for every grantee, but still important for them to consider whether it applies.

- **To what extent is it possible for participants to join from outside the target audience? Are there any limits to this?** For some grantees, the project is only open to a very specific target audience, for others the project is open to anyone to join (for example, to mix participants from different backgrounds together or to take an inclusive approach) and there is no right or wrong answer to this. Asking this question to grantees at this point can help them to consider how they will manage a situation when an individual tries to join that is outside of the target audience.

4 Running

- **Is the grantee planning to review their data and assess whether they are reaching the right target audience?** The majority of grantees reviewed the data that they collected to identify gaps in who they are reaching and how these can be addressed (for example, individuals from a particular background or area of the community). If the grantee is not doing this you may want to offer support from Spirit with how to review their data and target audiences effectively, or give examples from grantees that have had success with this.

5 Closing

- **What steps has the grantee taken to record and share their learning and apply it to their wider organisation?** All grantees interviewed in the process of creating the report shared learning about working with target audiences; the question above seeks to identify whether this learning has been documented and shared more widely within the organisation. Do they feel that these lessons will still be understood and acted upon if they left the organisation?