SPIRIT OF 2012
INVESTING IN HAPPINESS

HELPING GRANTEES TO REACH THEIR TARGET AUDIENCES

A GUIDE FOR GRANT MANAGERS
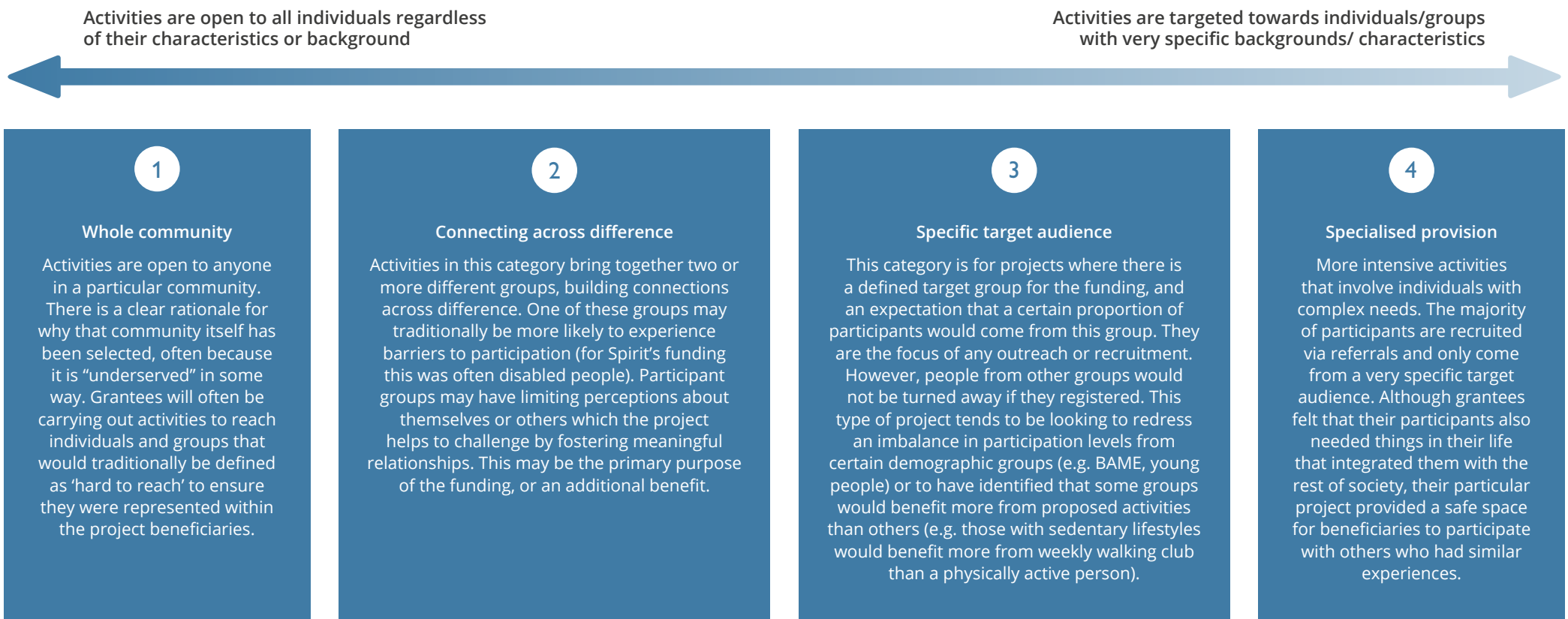
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INTRODUCTION

This short guide has been developed for grantmakers who fund project-based, participatory activity to achieve social change. Spirit funds arts, sports and volunteering projects that bring people together with the aim of improving wellbeing, changing attitudes and increasing social connectedness. The examples in this guide reflect these funding priorities. The guide outlines the initial steps for ensuring that grantees are reaching the individuals and groups that will most benefit from their activities/services, including a series of questions to frame discussions with grantees during a brief meeting at the outset of a grantmaker/grantee partnership. The questions are based on a study carried out by Spirit of 2012 (Spirit) based on the feedback from grantees, Spirit staff and other UK-based funders. A summary of findings can be found in the report "*How can Spirit of 2012 reach project beneficiaries more effectively?*"
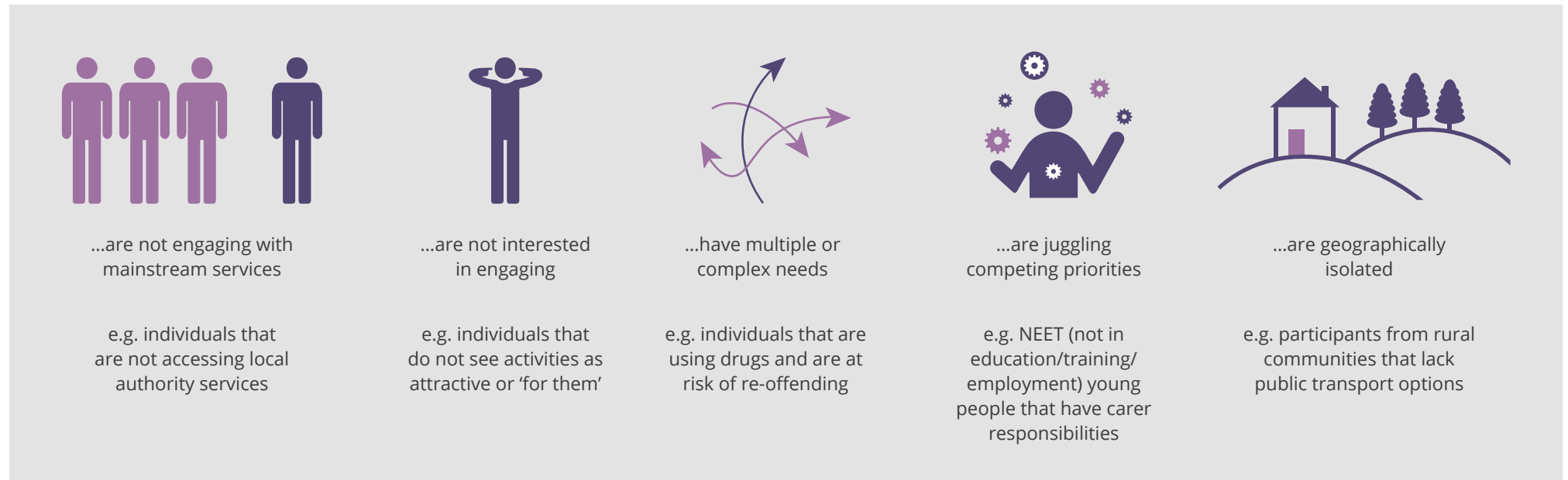
BEFORE YOU START: OPEN VS TARGETED APPROACHES:

Prior to entering into a discussion with your grantee regarding their target audience (using the questions outlined on page 5), it is important to consider the different approaches that grantees might take to working with their target audiences. Some examples of these approaches (based on feedback from Spirit grantees) are provided in the four boxes below. They represent a spectrum ranging from activities that are 'open to all' individuals or groups within a particular location to more 'targeted' activities that involve individuals or groups with specific backgrounds or characteristics.

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.

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.

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).

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.

BEFORE YOU START: INDIVIDUALS/GROUPS THAT ARE CHALLENGING TO ENGAGE

Spirit asks its grantees to collect basic data that helps identify whether they are finding some demographic groups more easy to recruit than others. There are a whole range of reasons for this, depending on the culture of those organisations, existing perceptions of the types of activity they are offering and the recruitment approaches they have taken. However, when Spirit grantees were asked which groups they found most difficult to engage, they quickly moved beyond basic demographic characteristics. Their responses predominately fell into five (overlapping) categories, listed below. More detail about how Grant Managers might use these categories to support their grantees in project design and recruitment is given on pages 5 and 6.

...are not engaging with mainstream services	...are not interested in engaging	...have multiple or complex needs	...are juggling competing priorities	...are geographically isolated
e.g. individuals that are not accessing local authority services	e.g. individuals that do not see activities as attractive or 'for them'	e.g. individuals that are using drugs and are at risk of re-offending	e.g. NEET (not in education/training/ employment) young people that have carer responsibilities	e.g. participants from rural communities that lack public transport options

We have used the term "challenging to engage" here because we feel like it is preferable to the contentious term "hard to reach". "Hard to reach" implies that if potential beneficiaries need to make themselves more available to funders and does not place enough onus on the grantee themselves. Neither does it consider whether that service is appropriate for all beneficiaries, based either on their needs or their preferences. "Challenging to engage" is not a perfect term, but does at least reflect a reality that grantees have found it more difficult to get some groups participate in their projects.

GRANTEE TARGET AUDIENCE: A GUIDE FOR SPIRIT GRANT MANAGERS

1 Designing — **2 Promoting** — **3 Joining** — **4 Running** — **5 Closing**

Designing

- To what extent has the grantee assessed and defined the target audience's need? e.g. through research/ their own activities?

- Where does the grantee fit on the Open vs Targeted Spectrum on page 3 and have they considered the advantages/ disadvantages of different approaches? How does this impact their approach to M&E?

- Would individuals or groups that are harder to engage (from the 5 categories on page 4) benefit from the grantees activities?

- If yes, does the grantee have sufficient capacity and expertise to work with them? Is there any additional support/expertise available within the grantee's network?

- What data could the grantee collect that would help them to identify individuals/groups that are harder to engage?

Promoting

- Is the grantee working with partners (e.g. at institutional/ community level) to promote their activities? Have they considered the challenges associated with this approach and steps to address them?

- Is the grantee conducting outreach activities to reach participants that are less engaged in mainstream services? If not, are there outreach activities they could be conducting?

- Is there the potential to engage 'Community Champions' within their approach?

Joining

- At what stage is it best to collect data from the participants (to avoid risks of creating a barrier/ disincentive to participate ?)

- To what extent is it possible for participants to join from outside the target audience? Are there any limits to this?

- What would the grantee do if these participants want to join?

Running

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

Closing

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

The questions on this page are for use with the grantee during a short session (we recommend 90 minutes). They are designed to facilitate an exploratory discussion about their approach to working with their target audience across a range of stages from designing through to closing activities. More details on each of the questions is included on the next three pages of this guide.

- **To what extent has the grantee assessed and defined the target audience's need e.g. through research and/or their activities?** This question seeks to explore and dig deeper into the extent to which there is a clear, evidence-based rationale for working with a particular target audience. This could come from the experience of the grantees, either through their monitoring of their day-to-day work or specific pilots, or from research (either conducted by the grantee or secondary research). It is advisable to ask the grantee for specific details regarding the research or experience they have used.

- **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 3) is intended to provide a lens for exploring (together with the grantee) where the organisation might fit on the chart, the extent to which they have assessed their approach and the corresponding advantages and disadvantages. The approach they take could also determine their approach to M&E and what they will be subsequently measuring. For instance, those on the more open end of the spectrum are likely to be more concerned with changes in perception within both their current participant groups and wider society. At this stage, if the grantee is aiming to explicitly bring two or more different groups together, it is important to think about setting targets for the proportion they want to reach of each group.

- **Would individuals or groups that are harder to engage (from the five categories in the report) benefit from the grantee's activities? If yes, does the grantee have sufficient capacity and expertise to work with them? Is there any additional support/expertise available within the grantee's network?** This relates to the categories (identified on page 4) for individuals that are considered 'hardest to engage' 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. Not every grantee will engage with individuals or groups from every category but it is important to understand the rationale for 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 the grantee collect that would help them to identify individuals/groups that are harder to engage?** It could be helpful for the grantee to ask additional questions as part of their registration process that might help them 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. This data might be qualitative, e.g. focus groups or practitioner feedback. In addition to data that the grantee collects themselves, it can also be helpful to consider what research or learning already exists regarding the individual/groups.

6

- **Is the grantee working with partners (e.g. at institutional/ community level) to promote their activities? Have they considered challenges with this approach and steps to address this?** Working in partnership can be effective way of reaching target audiences. However, there are also risks and challenges associated with using partners to reach the target audience, especially if the approach is not carefully thought through and carried out. For example, a partner may refer individuals who are outside of the target audience characteristics/parameters. This question is intended to identify the extent to which grantees have thought through their approach to engaging partners in reaching potential participants and how to mitigate any potential challenges.

- **Is the grantee conducting outreach activities to reach participants that are less engaged in mainstream services? Are there outreach activities they could be conducting?** Outreach, including direct community-level interaction to recruit participants is important to engage with individuals or groups that are 'harder to engage.' Not every organisation has the resources to do this nor do all organisations wish to (they may just prefer referrals from partners) In either case, it is important to understand why they are or are not taking this approach and explore the potential advantages with reaching harder to engage individuals or groups.

- **Is there the potential to engage 'Community Champions' within their approach?** Community Champions are individuals who are embedded in their communities to and can promote the organisation's projects as well as recruit participants. Community Champions may come from within the organisation (e.g. staff members) or from partners. This may not be viable/appropriate for all contexts but is worth exploring with grantees.

- **At what stage is it best to collect data from the participants (to avoid risks of creating a barrier/ disincentive to participate)?** In some cases, collecting data from individuals when they first attend an activity can create a barrier to ongoing participation. For instance, if they have had negative experiences with institutions that have asked for similar information before. It is important for grantees to consider whether this could be a risk/ consideration in their context when planning for data collection.

- **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 provide a an activity where participants from different backgrounds can interact together or to promote inclusivity) and there is no right or wrong answer to this. If participants can join from outside of the target audience has the grantee considered how this will affect the dynamic of activities and data collection? Finally, would these individuals 'take the space' of someone who could get a greater benefit from the project?

- **What would the grantee do if these participants want to join?** Ideally, grantees will have a plan for what to do if participants from outside their target audience ask to join their activities. For example, if they cannot join activities, are there other activities they could be directed towards and how will they manage telling the participants?

- **Is the grantee planning to review their data and assess whether they are reaching the right target audience?** Reviewing data to assess who is participating in the activities and if there are gaps in participation or reach is an important aspect of monitoring, for grantees across the open/ targeted spectrum. During the discussion it is useful to ascertain if the grantee is measuring this/plans to measure this and the way the data is being used/ could be used to improve participant recruitment. In particular, at what points in the project plan would it be possible to adjust recruitment approaches based on the data and/or get feedback to adjust the activities to meet the needs of participants? Also, how would they manage a situation where they decide a project is not appropriate for a participant?

- **What steps has the grantee taken to record their learning and apply it to/ share it with both their organisation and the wider sector?** The question above seeks to identify the extent of the grantee's learning practices/culture and whether learning is documented and shared more widely within the organisation (and if not, to what extent there are plans to do so). Do they feel that these lessons will still be understood and acted upon if they left the organisation? Have they also made plans to share any learning with the wider sector and what routes could they take to do this? (e.g. sharing through conferences or online networks).

Thank you for reading through this guide. If you have any queries regarding the content of the guide please contact Amy Finch, Head of Learning and Impact at Spirit of 2012 at **amy.finch@spiritof2012.org.uk**

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