

How to...

...use an outcomes framework

A Case Study



About this guide

This guide provides a step-by-step method for using the **Advice and Advocacy Outcomes Framework** to measure, evaluate, and report on the impact of your own work. It is designed to help you understand and apply the framework in a practical way, from selecting relevant outcomes and indicators, to gathering and analysing data. Whether you are new to using outcomes frameworks or looking to refine your evaluation practice, this guide will help you make your data collection more focused, actionable, and meaningful for both staff and funders.

What is an Outcomes Framework

An outcomes framework is a structured tool used to define, measure, and track the changes a service aims to create for its clients. It links the goals of the service to specific, measurable outcomes and indicators that show whether those goals are being met. This provides clarity on what success looks like, ensuring that data collection is focused, relevant, and meaningful for both service providers and clients. By using a framework, services can align their activities with tangible results, helping to demonstrate their impact and improve practice.

The **Advice and Advocacy Outcomes Framework** in this toolkit specifically focuses on outcomes that matter most to individuals accessing advice and advocacy services, such as financial security, access to rights, and improved confidence. It provides clear indicators for each outcome, helping services measure real client change and report back on tangible impact.

What the Advice and Advocacy Outcomes Framework Tells You About Impact

The **Advice and Advocacy Outcomes Framework** defines what meaningful change looks like for clients accessing your service. Unlike service activity data (what you did) or satisfaction feedback (how clients felt), this framework focuses on actual outcomes — the difference made to a person's situation, wellbeing, rights, or independence as a result of your work. This framework is structured around eight outcome areas, each representing a core domain of change:

- Financial Security
- Access to Rights and Justice
- Problem Resolution and Crisis Prevention
- Health and Well-Being

- Confidence and Empowerment
- Independent Living and Housing
- Community Connection
- Knowledge and Self-Advocacy

Each outcome includes a set of indicators that describe what success would look like. Using frameworks is a good way to ensure that data is operationally useful — meaning that it ensures all data coming into an organisation through evaluation is relevant, aggregatable, and supports decision making. These indicators guide the kinds of evidence you should collect to demonstrate progress.

Used properly, this framework becomes the foundation for meaningful evaluation. It shapes what data you collect, how you interpret it, and how you communicate your impact. If you have already carried out a data audit (recommended), you will already understand what types of data you collect, how they are structured, and where they are stored — and you can now begin using the framework. Review each outcome and ask:

- *Do we currently collect any data that evidences this outcome?*
- *Is this data structured, consistent, and retrievable?*
- *Is it already used in evaluation (e.g. in surveys, CRM fields, case studies), or does it remain aspirational? If it does, this is an opportunity to close the gap between intention and practice.*

Using the Framework to Inform Data Collection

The indicators in the **Advice and Advocacy Outcomes Framework** can be used as the foundation for building a consistent suite of data collection tools. Each indicator points to a specific kind of client change — and therefore suggests the kind of evidence you need to gather. This also makes the data more operationally useful. It ensures that the evidence collected isn't just for external reporting, but helps the organisation learn, adapt, and improve its delivery.

Once you have reviewed the outcomes and indicators, the next step is to translate them into practical tools such as:

- Outcome-linked client surveys
- Structured case study forms
- Interview or focus group topic guides
- CRM fields and reporting categories

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Each tool should be designed to collect evidence of change that aligns with the outcomes in the framework. You do not need to cover every indicator in every tool — instead, select a manageable set of indicators that reflect your service focus and data capacity.

Case Study: Oakchester Advocacy and Advice centre

Here's an example for a fictional advice service called the 'Oakchester Advocacy and Advice Centre', a small local organisation that supports people in the town of Oakchester who are experiencing financial hardship, housing insecurity, or problems accessing the services they're entitled to. Most clients are on low incomes, often juggling multiple issues, and may be struggling to navigate systems or assert their rights. The service offers one-to-one support, practical advice, and advocacy to help people resolve immediate crises and achieve longer-term stability. They'll use this data to improve the advice they're providing - for instance through training for their advisors and case workers (an example of operationally useful data).

1. *Selecting the outcomes the service most directly supports.*

Oakchester Advocacy and Advice Centre wants to build a client outcome survey using the indicators in the framework. Based on their client group and service model, they decide to focus on four outcomes that are most relevant: Financial Security, Access to Rights and Justice, Health and Wellbeing, and Confidence and Empowerment. Each of these outcomes has a set of associated indicators, and the organisation plans to use a short survey to collect evidence of change across these areas. Examples of indicators they're considering include '*Client has improved understanding of their rights*', '*Client has increased confidence about managing money*', and '*Client has reported reduced stress or anxiety related to their issue*'.

2. *Choose indicators that reflect observable client change*

Oakchester Advocacy and Advice Centre now has to decide whether to use all the indicators, or just some. At this point they'll understand that with over 30 indicators across the four outcomes they've selected, using them all would lead to a very long survey. So they decide to pick two indicators for each outcome. The eight indicators they select are:

Financial Security:

- *Client has secured new benefit entitlements*
- *Client can manage day-to-day financial pressures*

Access to Rights and Justice:

- *Client understands their rights and entitlements*
- *Client has successfully challenged a decision or accessed a service*

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Health and Wellbeing:

- *Client has reported reduced stress or anxiety related to their issue*
- *Client feels more able to manage day-to-day life*

Confidence and Empowerment:

- *Client has increased confidence about managing money*
- *Client feels more confident dealing with services*

These indicators provide a manageable and meaningful balance of factual and perception-based measures, allowing the service to build a focused client survey while still covering the breadth of its intended impact.

3. Write survey questions that directly test each indicator.

Oakchester Advocacy and Advice Centre has selected two indicators for each of its four priority outcomes. The next step is to turn each indicator into a clear survey question that can generate usable evidence. How they ask survey question depends on a number of factors such as the age and competency of the person they're asking to complete it, and whether they're measuring change through a pre and post (before and after) survey, or just taking a snapshot through a single survey (often called an insights survey). In this case, they want to measure impact through two surveys, and for this, they will stick closely to the indicator format:

Financial Security:

- **Indicator:** *Client has secured new benefit entitlements*
- **Question:** *Since receiving support, have you accessed any new benefits or financial support?*
- **Indicator:** *Client can manage day-to-day financial pressures*
- **Question:** *To what extent can you manage your day-to-day financial pressures?*

Access to Rights and Justice

- **Indicator:** *Client understands their rights and entitlements*
- **Question:** *To what extent do you feel informed about your rights and entitlements?*
- **Indicator:** *Client has successfully challenged a decision or accessed a service*
- **Question:** *Since receiving support, have you successfully challenged a decision or accessed a service you were previously unable to?*

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Health and Wellbeing

- **Indicator:** *Client has reported reduced stress or anxiety related to their issue*
- **Question:** *To what extent has your level of stress or anxiety about this issue changed?*
- **Indicator:** *Client feels more able to manage day-to-day life*
- **Question:** *To what extent do you feel able to manage day-to-day life?*

Confidence and Empowerment

- **Indicator:** *Client has increased confidence about managing money*
- **Question:** *To what extent do you feel confident about managing your money?*
- **Indicator:** *Client feels more confident dealing with services*
- **Question:** *To what extent do you feel confident when dealing with services or organisations?*

Together, these questions provide a structured way to test whether change has occurred across multiple outcome areas, and generate operationally useful evidence that can be tracked over time, reported thematically, and used to inform practice and decision-making. This data becomes operationally useful because it directly links the outcomes to observable client changes, providing clear insights that can guide adjustments in service delivery. It enables Oakchester to track progress, identify areas where clients are not making the expected gains, and refine support strategies. Additionally, it allows staff to make informed decisions on resource allocation and respond to emerging client needs with more targeted interventions.

4. Decide on a single measurement style.

A measurement level refers to the type of response scale you use — for example, binary (yes/no), ordinal (scales like strongly agree to strongly disagree), or nominal (categorical choices). Ordinal scales — such as rating confidence or agreement from high to low — are the most common and work well for most perception-based indicators.

The choice depends on what Oakchester Advocacy and Advice Centre want to know, as well as other factors like ease of use for their clients — but they need to think carefully. Binary (yes/no) questions are easier for clients to complete, especially where there may be literacy or cognitive barriers. However, they can lead to longer surveys and tend to generate less interesting data.

5. Example using a mix of measurement styles

Oakchester Advocacy and Advice Centre has decided to use a combination of binary and ordinal scales to capture both factual changes and perceptions of client progress. They have chosen indicators that align with the financial security and confidence outcomes and will track them through a short survey, combining both types of response formats to create a balanced approach:

The survey:

Q1: *To what extent can you manage your day-to-day financial pressures?* (Indicator: Client can manage day-to-day financial pressures): Response scale: 1 = Not at all → 7 = Completely

Q2: *Since receiving support, have you accessed any new benefits or financial support?* (Indicator: Client has secured new benefit entitlements): Response scale: Yes / No / Not sure

Q3: *To what extent do you feel informed about your rights and entitlements?* (Indicator: Client understands their rights and entitlements): Response scale: 1 = Not at all informed → 7 = Very well informed

Q4: *Since receiving support, have you successfully challenged a decision or accessed a service?* (Indicator: Client has successfully challenged a decision or accessed a service): Response scale: Yes / No / Not sure

Q5: *To what extent has your level of stress or anxiety about this issue changed?* (Indicator: Client has reported reduced stress or anxiety related to their issue): Response scale: 1 = Much worse → 7 = Much improved

Q6: *To what extent do you feel able to manage day-to-day life?* (Indicator: Client feels more able to manage day-to-day life): Response scale: 1 = Not at all able → 7 = Completely able

Q7: *To what extent do you feel confident about managing your money?* (Indicator: Client has increased confidence about managing money): Response scale: 1 = Not at all confident → 7 = Very confident

Q8: *To what extent do you feel confident when dealing with services or organisations?* (Indicator: Client feels more confident dealing with services): Response scale: 1 = Not at all confident → 7 = Very confident

NOTE ON SCALES: There are various approaches to using a 1–7 scale. In some cases, you might label only the endpoints (e.g. 1 = Not at all confident, 7 = Very confident), leaving the mid-points as numbers. This keeps the format simple and familiar, especially when surveys are self-completed. In other cases, you might label every point on the scale to give clients more guidance. This can help people choose more precisely — but it also carries a risk. Different people may interpret the same label differently (e.g. one person's 'somewhat confident' might mean 'I feel okay most days' while another's might mean 'I rarely feel in control'), which can reduce consistency across responses. Your choice should reflect how familiar your clients are with surveys, how consistent you want the data to be, and how much nuance you actually need in the results.

Final thoughts

Oakchester's experience shows that building a survey from the outcomes framework creates tools that are purposeful, well structured, and directly aligned with the difference the organisation is trying to make. Starting with clear outcomes and indicators helped them write questions that were specific, testable, and easy to analyse.

By taking a structured, step-by-step approach, they ensured that the survey wasn't just functional — it was meaningful. Each question could be linked back to a measurable change, and each response gave them evidence they could use. The whole process supported not only better data, but better evaluation thinking across the team.

(For those interested in going further: this kind of clarity — aligning indicators, outcomes, and survey design — is a good example of internal validity. In other words, it shows you're measuring what you set out to measure.)