

# Engaging in outcomes-based partnerships

A framework to support service provider  
readiness

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# Introduction

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This framework has been developed to support service providers, and those who work with them, to better understand what engaging in outcomes-based partnerships (OBPs) means and where on that journey they currently stand.

At the heart of an OBP is a shared understanding and commitment to achieving better outcomes for service users. This accountability on the basis of outcomes opens the possibility and actively encourages adaptive management of service delivery, without being tied to particular review points or activities in a workplan. Therefore, OBPs often represent a fundamentally different way of working for organisations which are used to a fee-for-service or milestone-based contract and for this reason, OBPs may seem complex and opaque to organisations unfamiliar with them.

The aim of this framework is to demystify what it takes to successfully engage in OBPs, whether organisations are new to the concept or already have some experience. It articulates the key competencies that service providers need to participate in an OBP, to build their capacity for outcomes-based delivery, and then to embed outcomes-based approaches throughout their organisation's work. It is designed with low- and middle-income country contexts particularly in mind but will have relevance for those in high-income country contexts. The framework primarily aims to support service providers themselves to think about relevant issues, but should also be informative for all looking to better understand and support them.

This framework consolidates and builds on work and insights from existing practitioners. It provides a new service provider-centric view of what it takes to successfully deliver services in an OBP and should be seen as a complement and not a substitute to other publications. Our methodology to develop this framework involved:

- **An initial scoping of published literature** – we identified only two existing documents dealing explicitly with competencies necessary for service providers to deliver in an OBP. These frameworks were therefore supplemented by case studies and evaluations of previous OBPs which commented on critical factors for service provider's success in delivery.
- **A series of semi-structured Key Informant Interviews with experts in the field** - to understand how they assessed and supported service providers in OBPs. This allowed us to include a wider and more nuanced set of inputs to the framework.
- **A workshop with experienced OBP stakeholders to review the draft framework and provide feedback.** This informed the revisions to the draft and resulted in the final framework.

This framework is sister to another framework looking at the readiness of ecosystems to develop outcomes-based partnerships at different levels of maturity. The full methodology for both frameworks, as well as the findings of our literature review, which provides more detail and background to the work, [can be found here](#).

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## Framing and limitations of the framework

This framework is designed to be broadly applicable across many contexts and sectors, so the details of how the competencies manifest may need to be adapted for particular circumstances. More broadly, there are a number of other points to be borne in mind when considering using this framework.

- This framework should be viewed as a diagnostic tool to support service providers and their partners to identify areas for development in order to engage in OBPs. It is not a “how-to” guide on achieving that development, but instead should provide a sense of what the direction of travel needs to be. It is not designed to assess whether an organisation is capable of participating in an OBP or not. Instead, it should be regarded as a tool to identify potential gaps in experience or capacity which can be filled over time.
- There are a few key definitions which are pertinent to a full understanding of the framework:
  - **Service providers** should be understood as those organisations directly delivering activities and interventions which aim to deliver improved outcomes for the target population.
  - **Intermediaries** may be part of the delivery consortium and support service providers to deliver outcomes but they do not deliver the services directly and therefore should be thought of as “capability enhancers” rather than service providers.
  - **Outcomes-based partnership** is the partnership between, at a minimum, an outcomes funder and a service provider with a view to delivering tangible positive changes in the lives of the target population. Contractual payments are based partially or fully on the achievement of those outcomes. The partnership may also include impact investor(s), additional service providers, intermediaries and evaluators, or a combination of these.
  - **Delivery consortium** is the group of organisations working to deliver outcomes within an OBP. This may be a single service provider, or it may involve a consortium of other service providers, intermediaries supporting them, and impact investors.
- The framework focuses on the competencies, processes and systems of service providers which are specific to OBPs. Many of these may also be beneficial to delivery under other contract types but in an OBP these are essential competencies. Where there is more than one service provider involved in the delivery consortium, some of these competencies may be held at or across the consortium level, rather than by each individual organisation.
- In a similar vein, there are more general competencies, including the ability to deliver services and achieve results, if not outcomes, which are assumed. These kinds of competencies are necessary for service providers, regardless of the type of contract they are operating under, and therefore outside the scope of this framework.
- Crucially, this framework also assumes commissioner led design of the OBP opportunity, generally by one or more outcomes funders. A commissioner is the organisation which commissions or contracts the services. While often the same as the outcome funder, it may also be that the government commissions services but is supported in paying for the outcomes by donor agencies. The framework covers those competencies required to bid for and deliver services in an OBP but not those specifically related to designing a partnership from scratch. This focus is one of the points which makes this framework

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different to existing publications in this area<sup>1</sup>. Assuming commissioner-led design also assumes that the outcome areas specified in the published opportunity are in line with national policy goals and strategies, and so alignment of the service provider's mission and work with those policy goals is also assumed and outside the scope.

## Part 1: Framework overview

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This framework is first and foremost designed to facilitate a service provider's self-reflection of where their organisation stands relative to the competencies needed to successfully engage in an OBP. In this way it should also be useful for anyone wishing to support service providers or better understand their operations in an OBP. It may also be useful to inform the selection criteria of commissioners when awarding contracts.

- Outside of the framework, there are a series of characteristics of organisations that should be considered as pre-requisites, as they are applicable to all organisations working for and with communities, regardless of the programme structure. We present these at the beginning of Part 2 and they include characteristics such as transparent governance, evidence of financial stability and a track record of service delivery.
- The framework is structured around three levels which roughly correspond to how much experience a service provider has in working in OBPs. It covers the key competencies that service providers need to participate in an OBP, build their capacity for outcomes-based delivery, and then embed outcomes-based approaches throughout their work. Each level is additive so that at level two, the competencies associated with level 1 are already assumed, etc. Part 1 presents an overview of the framework and the necessary competencies in each level. In Part 2 we provide more detail on what each competency might look like in practical terms.
- Each level is comprised of the same five dimensions. These are broad groupings of the competencies required for effective participation in OBP and in line with dimensions published in other works, or often mentioned by stakeholders. They are:
  - **Strategic fit** – ensuring that the essence of an OBP - delivering better service user outcomes rather than activity milestones, often in close collaboration with others - is understood and internalised within a service provider
  - **Leadership and decision-making** – senior management exemplifying the commitment to outcomes-based delivery, making evidence-based decisions and empowering others to do so as well

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<sup>1</sup> The "Social Impact Providers Toolkit" by Think Forward and others covers the design stage of impact bonds from the service provider viewpoint and the skills involved

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- **Partnership working** – the organisation building and sustaining constructive relationships within and beyond the OBP to support service delivery and the achievement of outcomes
  - **Data and evidence** – having a strong theory of change upon which data systems are built to support evidence-based decision making and adaptive management
  - **Finance and systems** – Understanding the cost base for achieving outcomes and being able to link this with changes in service delivery in order to dynamically manage expected costs and revenues.
  - Cutting across all these dimensions at all levels of the framework is a **culture of learning, innovation and adaptation**. This encapsulates the attitude to and way of working in an OBP that sets it apart from other programme structures. It is about the intangible desire to constantly improve the impact of services, the humility to recognise that we are unlikely to ever have all the answers, and the willingness to try new approaches to understand what works. This should be a culture that is central to how the organisation operates and manifests across all dimensions in different ways.
  - This framework should be applicable to individual service providers working in partnership with an outcomes funder, as to a delivery consortium which may also include investor(s), intermediaries and other service providers. For such delivery consortia, we distinguish between competencies which should be held by every service provider in the consortium and those which may be held at a consortium level, which are shown in *italics*, meaning that at least one organisation, potentially, but not necessarily a service provider, must have that competency. In the case of a single service provider, they should aim to develop all competencies.

## 1.1. Foundations for outcomes-based delivery

The competencies at this level are the core foundations for any service provider to engage successfully in OBPs. These should be considered before each organisation in a delivery consortium commits to working together.

If organisations have very little familiarity with OBPs, this is the level to look at to see whether they are well placed to work in such a partnership. Some competencies are only required at the consortium level and would not be needed by every organisation in a consortium. However, if there is only one service provider delivering, then all competencies would ideally need to be present within that organisation.

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### Strategic fit

- Willingness to be accountable for outcomes, rather than just organisational activities
  - Willingness to learn across the organisation and for that learning to drive adaptation of services
  - Organisational objectives and/or theory of change are linked to the target outcomes
  - Understanding the ways in which delivering OBP are different to grant-based / fee-for-service contracts
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**Leadership and decision-making**

- Senior management are committed to achieving contractual outcomes and will support and empower staff to maximise impact
- *Senior management are capable of interpreting financial and performance data to drive better delivery*

**Partnership working**

- Organisation is committed to working collaboratively with outcomes funders, investors, and other delivery organisations (as appropriate) to maximise impact within an OBP
- Organisation has relationships that will enable effective working with target communities
- Organisation can build and sustain constructive relationships with stakeholders with direct influence over programme delivery

**Data and evidence**

- *Decision makers understand the desired outcomes and their measurement*
- *There is a strong theory of change for delivering contractual outcome metrics*
- Beyond collecting data to report on progress retrospectively, decision makers want to use data to improve services to maximise impact in real-time

**Finance and systems**

- Costs of individual activities and previous service delivery are clear and can be communicated
- *Costs of delivering contractual outcomes can be calculated or reasonably estimated*
- If own funding is insufficient to pre-finance service delivery, then organisation is able to access outcomes-based investment
- Each organisation's funding sources are stable, even if timebound, so that it is not reliant on the success of the OBP

**1.2. Building outcomes-based delivery capacity**

With the foundations in place, this level describes the competencies required to operate successfully in an OBP. Organisations may choose to invest in building these competencies before engaging in their first OBP. Alternatively, they may learn and build them during the implementation of an OBP, or somewhere in between. As at the foundational level, there are some competencies that need to be held at a consortium level, without necessarily every organisation having that particular capacity where there is more than one service provider.

<b>Strategic fit</b>	<ul style="list-style-type: none"> <li>• Ability to assess the strategic, reputational and commercial value that involvement in an OBP has for the organisation</li> </ul>
<b>Leadership and decision-making</b>	<ul style="list-style-type: none"> <li>• Senior management actively support delivery teams to identify opportunities to improve outcomes</li> <li>• Authority to make decisions is given to the lowest appropriate level</li> <li>• Decision makers at all levels use data and evidence to inform decision making</li> <li>• Performance management processes are in place for decision makers and delivery teams</li> <li>• <i>Senior management attend governance meetings, report on risks, progress and challenges and can identify and advocate for contractual changes if required</i></li> </ul>
<b>Partnership working</b>	<ul style="list-style-type: none"> <li>• Organisation has a clear understanding of their role and competencies relative to other partners and is able to collaborate and work with others to support effective delivery of outcomes</li> <li>• <i>Organisation can build and sustain constructive relationships with a broader set of stakeholders with indirect influence over programme delivery</i></li> </ul>
<b>Data and evidence</b>	<ul style="list-style-type: none"> <li>• <i>Management information systems allow OBP to connect inputs and activities to outputs and outcomes</i></li> <li>• Management information data is systematically collected, cleaned and analysed to inform delivery decisions</li> <li>• Decision makers have a good grasp of the indicators in the MIS and how they connect to the contractual outcomes metrics</li> <li>• Decision makers understand the logical progression from intervention to outcomes and use this to inform changes to service delivery</li> </ul>
<b>Finance and systems</b>	<ul style="list-style-type: none"> <li>• <i>Ability to develop a financial model that connects delivery costs and anticipated outcomes revenues</i></li> <li>• <i>Capacity to link changes in delivery approach to delivery costs, outcomes and anticipated outcomes-based payments</i></li> <li>• <i>Capacity to identify potential drivers of cost overruns and / or under-achievement of outcomes and manage this uncertainty appropriately</i></li> </ul>

### 1.3. Embedding outcomes-based delivery

This section describes competencies that service providers may develop during the delivery of OBPs, or may choose to invest in developing if they believe OBP offer a strong strategic fit. Competencies



at this level start to embed the ways of working associated with OBP into business-as-usual operations. They speak to the systems, processes and leadership capacity required to confidently lead the delivery of an OBP, whether individually or as the lead of a delivery consortium. As effective operators in OBPs, each service provider at this level is expected to hold all the competencies themselves and so there are none which are a jointly held across the consortium.

Culture of innovation, learning and adaptation

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**Strategic fit**

- Organisation is confident in assessing outcomes-based opportunities, forming delivery partnerships, bidding for and delivering outcomes-based opportunities
- Adaptive ways of working to deliver outcomes are embedded across all programmes

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**Leadership and decision-making**

- Decision makers at all levels demand and use data and evidence to inform decision making
- Decision makers at all levels understand the limitations of available data and can work constructively with it
- Decision making processes, including access to evidence, are clearly defined and articulated across the organisation
- All staff are aware of the expectations of them in their role and respond to clearly articulated and consistently implemented incentives.
- Senior management can identify and effectively advocate for contractual changes if required

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**Partnership working**

- Organisation can build and sustain mutually beneficial relationships with a broad set of stakeholders that sustain beyond individual programmes and support senior management to anticipate contextual changes that may impact outcomes delivery

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**Data and evidence**

- Standard data processes are automated including key analyses that drive decision making
- Capacity exists to run bespoke analyses to inform decision making as necessary
- Decision makers can articulate questions about delivery effectiveness in ways that the MIS can answer and can suggest improved indicators where appropriate

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**Finance and systems**

- Finance systems and processes are designed to systematically link delivery costs with programme outcomes
- Costs of delivering contractual outcomes can be calculated or reasonably estimated with a high degree of confidence

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## Part 2: Detail of the framework

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Here we present the competencies at each level in more detail, illustrating how they might manifest in practical terms to give service providers a better sense of whether or not they currently meet them.

There are a few characteristics of organisations that should be considered as pre-requisites even before looking at the framework. These conditions are generally applicable to all organisations working for and with communities, regardless of the programme structure and are likely to form part of any funders' standard due diligence processes. We therefore highlight them here, outside the framework. They include:

- Basic safeguarding policies are in place and adhered to, covering both social and environmental safeguards.
- Anti-corruption and anti-money laundering policies are in place and adhered to. This is particularly important if the service provider is receiving funds directly from international sources but is likely to form part of any outcome funder and / or investor's due diligence processes.
- National data protection regulation is well understood and data collection and storage processes follow the requirements.
- The organisation is financially stable, able to complete financial reporting in a timely manner and not at risk of going into financial distress, and so is able to carry out the anticipated services effectively.
- The organisation has a track record of delivering services in the issue area of interest and / or of working with the target population. This includes having both the staff, processes and systems to deliver results.
- The organisation has a clear and transparent governance structure so that lines of oversight and control are clear. This includes senior management being accountable to and supported by an independent board with processes in place to address any performance issues.

## 2.1 Foundations for outcomes-based delivery

This level describes the foundations required to successfully engage in OBPs, even if a service provider has no experience of working in such a partnership before.

At this level, the cross-cutting theme of learning, innovation and adaptation is an attitude driven by the senior leadership in the organisation. They should exemplify the humility to learn and willingness to improve service delivery that drives iterative adaptation in an OBP. From their example and over time, this attitude should spread through the rest of the organisation to support a mission-driven learning approach.

### Strategic fit

At the foundational level, strategic fit encompasses the core understanding of what working in an OBP means and allows organisations to decide whether or not they want to work in that way. It is the dimension which, at this level, determines whether the service provider has an organisational culture that is a good fit for working in an OBP. Experience shows that it is mission-driven organisations that thrive off the flexibility to adapt their delivery based on data driven learning which succeed in OBPs. This revolves around the fundamental understanding that being judged on the achievement of outcomes, rather than the fulfilment of a workplan or set of pre-agreed activities, means the emphasis in accountability has changed. If an organisation, driven by its senior management, is committed to that focus in their way of working, then a service provider should have a good strategic fit for an OBP.

	Competency	Illustration
Culture of innovation, learning and adaptation	<b>Willingness to be accountable for outcomes, rather than just organisational activities</b>	<ul style="list-style-type: none"> <li>• There's an understanding that outcomes and outputs are the measures of success, and not the work that went into achieving them.</li> <li>• It is possible that the organisation already tracks outcomes as one of its own performance measures.</li> </ul>
	<b>Willingness to learn across the organisation and for that learning to drive adaptation of services</b>	<ul style="list-style-type: none"> <li>• Driven by senior leadership and key champions across the organisation, there is a willingness to use evidence to proactively learn from past delivery to improve future delivery of services.</li> <li>• The organisation is likely to have previously adapted services based on feedback and data or at least, can envisage how that feedback and adaptation loop would operate for them.</li> </ul>

**Organisational objectives and/or theory of change are linked to the target outcomes**

- The mission of the service provider is its driving force, and it is eager to work flexibly and try new approaches, in order to realise that mission.
- The mission and the resulting organisational objectives or theory of change are strongly aligned with the target outcomes specified in the OBP opportunity, so that the organisation has both the experience and motivation to work towards those outcomes.

**Understanding the ways in which delivering OBP are different to grant-based / fee-for-service contracts**

- OBPs bring a renewed focus on collaborative working and their success depends in large part on the strength of those relationships. Being accountable for outcomes, rather than the completion of operational activities requires all delivery organisations to seek, communicate and act on opportunities for improvement.
- Organisations should be eager to work with and learn from others, both in the bidding and implementation stage of a partnership.

**Leadership and decision-making**

At the foundational level, this dimension largely revolves around the capacity of senior management, as opposed to decision makers across the organisation more broadly. Their leadership in terms of driving the commitment to an outcomes-oriented mindset is crucial to building that culture across the organisation. This is also one of the key attributes that OBP investors have mentioned as a criterion for them when assessing who to partner with to form a delivery consortium.

Finally, there should be strong capacity to understand and interrogate both financial and performance data, which will ultimately be linked to the achievement of outcomes. At the foundational level in a consortium, this competency does not necessarily have to be present in each service provider organisation; it may, for instance, be the investor or their appointed performance manager that leads this analysis.

Competency	Illustration
<p><b>Senior management are committed to achieving contractual outcomes and will support and empower staff to maximise impact</b></p>	<ul style="list-style-type: none"> <li>• Senior management place outcomes at the heart of how they lead the organisation and in their communications with staff.</li> <li>• They create a culture in which staff have the confidence and capacity to act on opportunities, using evidence to improve delivery.</li> </ul>

**Culture of innovation, learning and adaptation**

**Senior management are capable of interpreting financial and performance data to drive better delivery**

- Among the delivery consortium, there are senior managers who can understand the links between current expenditures and performance in terms of MIS indicators and, where measurable, outputs and outcomes.
- These managers can also extrapolate what that is likely to mean for future performance – operational and financial, and recommend changes as appropriate.
- They are able to articulate requests for more detailed information that answers pertinent questions raised in governance meetings of the organisation or consortium, as appropriate.

**Partnership working**

Partnership working is another defining characteristic of OBPs and at the foundational level this dimension focuses on the internal relationships within an OBP as well as with those stakeholders who have direct influence over the achievement of outcomes. For the first competency, if there is only a service provider and outcome funder then that relationship is clearly important and in focus. As soon as others are involved and there is a delivery consortium then how these partners work amongst themselves to deliver better outcomes, including appropriate coordination, division of responsibilities and trust is crucial.

Externally, it is important that the service provider(s) can form good working relationships both with the communities they are trying to serve and the stakeholders who directly influence the context in which they work. In both cases the skill lies in being able to navigate informal networks and relationships effectively and it is therefore likely that effective service providers will have a long history of working in the relevant geography.

Competency	Illustration
<p><b>Organisation is committed to working collaboratively with outcomes funders, investors, and other delivery organisations (as appropriate) to maximise impact within an OBP</b></p>	<ul style="list-style-type: none"> <li>• Each organisation should understand that outcomes-based partnerships require collaboration and commitment to achieving outcomes from all partners.</li> <li>• This may include ceding control of areas of implementation that an organisation may be used to implementing, or working with unfamiliar systems, or adhering to reporting formats which initially require more effort to complete, in order for all partners to work together effectively.</li> </ul>
<p><b>Organisation has relationships that will enable effective working with target communities</b></p>	<ul style="list-style-type: none"> <li>• Organisation is aware of who the target population is and what their potential barriers are to engaging with services and achieving outcomes.</li> </ul>

- They already have or can easily build the necessary relationships to work effectively with that community. This may be, for example, through networks with local leadership councils, smaller community groups, and / or local institutions which already serve the target population

**Organisation can build and sustain constructive relationships with stakeholders with direct influence over programme delivery**

- Each organisation is able to map the key stakeholders with direct influence over delivery of activities, through their position in an institution or wider groups.
- The organisation can build relationships with these individuals to ensure their support for the programme so that delivery can progress without delay.
- The organisation is aware of any regulatory requirements, formal or informal permissions, that are needed to operate successfully in the given context and can secure those.

**Data and Evidence**

At this level, the data and evidence dimension is focused on the fundamentals – a well-constructed theory of change and a commitment to understanding and using data to drive service delivery adaptations to drive better contractual outcomes.

Each service provider should have experience in collecting relevant data but before entering the OBP, its use may be limited to reporting on progress of service delivery. Whilst a positive attitude towards using data to inform delivery in real-time should be present in all organisations, the understanding of the detail of specific contractual outcomes and their measurement could be held in only one organisation within a delivery consortium. Similarly, a theory of change is needed which clearly links service delivery to contractual outcomes and an understanding of all the links and nuances therein should be held by at least one organisation, if operating in a consortium. The key difference between a theory of change for a traditional milestone-based contract and one for an OBP is that in the former, outcomes *should* be achieved if all the links work as planned, whilst in an OBP outcomes *must be achieved* in order to receive payment. Therefore, if outcomes are not being achieved then the theory of change needs to be revisited to understand which links are not working and adapt service delivery to strengthen them. This is the second competency described in this section.

Competency	Illustration
<b><i>Decision makers understand the desired outcomes and their measurement</i></b>	<ul style="list-style-type: none"> <li>• As outcomes payments are linked to the achievement of contractually agreed outcomes, it is crucial that within the organisation or delivery consortium, there are leaders who are comfortable</li> </ul>

***A strong theory of change for delivering contractual outcome metrics***

with the precise definition and measurement of those outcomes.

- For instance, whether job placement should be evidenced by an employment contract or by a first payslip could make an important difference to the operations of a consortium targeting improved employment outcomes.

**Beyond collecting data to report on progress retrospectively, decision makers want to use data to improve services to maximise impact in real-time**

- In the organisation or delivery consortium, as appropriate, there already exists or has been developed, a theory of change which clearly links the activities to be implemented to the contractual payment metrics.
- At least one partner is aware of the various causal links between the activities and the payment metrics and understands what adaptations may be effective if changes to the delivery approach are needed.

- Decision makers in the organisation recognise that data is more powerful than just as a means of reporting progress and instead should be harnessed and used to improve delivery by learning from past implementation experience.
- Data should be seen and used as the formal evidence linking activities to service user outcomes. Requests for new measurement tools or indicators which illustrate that link are a sign of this demand for evidence-informed decision making within an organisation.

**Finance and systems**

Financial management in an OBP goes far beyond budgeting for activities and reporting on project expenditure. At the foundational level, the competencies centre on the requirements to be able to bid effectively for an OBP opportunity, while the financial systems and competencies to deliver during an OBP are covered in level 2.

Importantly, costs should be understood as the costs of delivering outcomes and not just services. They should be informed by the previous service delivery experience of all members of a delivery consortium, where it exists (competency 1) but then at least one member of the consortium must also be able to bring these together along with the theory of change in order to estimate the costs of delivering outcomes with a reasonable degree of confidence (competency 2). It is necessary to calculate the costs of delivering outcomes because either that will determine the outcomes price with which the service provider or consortium bids, or it will tell them whether or not they can viably deliver services with the announced outcomes price of the opportunity.

The involvement of up-front funding to a service provider from an impact investor is what differentiates impact bonds from other OBPs and is necessary if the service provider does not have the working capital to pre-finance service delivery. Finding and forming strong relationships with those investors is crucial to the success of OBP, where they are required.

Finally, while stable finances are often a pre-requisite to receive funding in general, a diversity of funding sources becomes more important for service providers in an OBP, particularly those without an investor. Here the service provider is taking on significantly more risk than in a milestone-based contract, as their revenue is dependent on the achievement of outcomes, compared to milestones in other contracts, which are generally structured in order to smooth the cashflow of the service provider. In particular, a service provider financing their own delivery should not be reliant on achieving the first set of outcomes and receiving payment for them, as performance in an OBP can often improve over time. Even if an investor is involved in an OBP, there may still be some performance risk transferred to the service provider and so robust finances are necessary to bear the risk of underachievement.

Competency	Illustration
<b>Costs of individual activities and previous service delivery are clear and can be communicated</b>	<ul style="list-style-type: none"> <li>• A track record of delivering similar services is important as a reference point for what the costs of delivering outcomes are likely to be under the partnership.</li> <li>• Each organisation needs a clear understanding of what the various cost components of their previous delivery has been, what drives variation in these, and be able to communicate that to partners</li> </ul>
<b>Costs of delivering contractual outcomes can be calculated or reasonably estimated</b>	<ul style="list-style-type: none"> <li>• Delivering outcomes is not the same as delivering activities in the expectation that they will lead to positive outcomes. For example, in order to secure job placements, support may be needed for employers as well as participants in training programmes, and not every service user will achieve the outcomes anticipated.</li> <li>• Calculating the costs of delivering outcomes requires a thorough understanding of the various components of the theory of change, the costs of relevant previous service delivery, potential new components, and robust estimates of likely success rates for service users to achieve contractual outcomes.</li> </ul>
<b>If own funding is insufficient to pre-finance service delivery, then organisation is able to access outcomes-based investment</b>	<ul style="list-style-type: none"> <li>• The organisation has the networks to contact potential investors – potentially including previous grant funders - directly or can enlist support from organisations which have the required networks.</li> <li>• The organisation has an understanding of the motivations of impact investors and so can</li> </ul>

Culture of innovation, learning and adaptation



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approach relevant organisations to discuss whether they would want to be involved in the partnership.

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**Each organisation's funding sources are stable, even if timebound, so that it is not reliant on the success of the OBP**

- Involvement in an OBP places greater scrutiny on the achievement of outcomes, which can come with increased risk. The organisation's finances and its medium-term future should therefore be secure without participating in an OBP.
- If an additional revenue stream is a motivation for participating in the OBP then that is likely to act as a disincentive for investors in the partnership who will be primarily concerned that the service provider understands and is committed to achieving outcomes.

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## 2.2 Building outcomes-based delivery capacity

With the foundations in place, this level describes the competencies required to operate successfully in an OBP. Organisations may choose to invest in building these competencies before engaging in their first OBP. Alternatively, they may learn and build them during the implementation of an OBP, or somewhere in between.

Whilst operating in an OBP the culture of learning, innovation and adaptation should become embedded throughout the organisation. Senior management should be actively seeking out the evidence to inform decision making while all staff feel empowered to question processes, systems and the delivery approach to ensure that all operations are focused on achieving outcomes. This includes having feedback loops so that staff are expected and encouraged to raise challenges, while senior management support them and engage in constructive problem solving.

### Strategic Fit

There is only one additional competency beyond the foundations at this level because strategic fit is so important to a successful OBP that most of the strategic considerations for need to be covered in the foundations.

As capabilities are built to operate in an OBP, the organisation should become better able to assess the value of participating in further opportunities. Risks may include: under-achievement of contractual outcomes harming an organisation's reputation with partners, or being associated with organisations or institutions which pose a reputational risk, the social challenge not being appropriate for an OBP and so involvement would not further the service provider's mission and strategic priorities, or the commercial risk if the organisation is fully or partially pre-financing service delivery themselves ahead of outcomes being achieved.

	Competency	Illustration
Culture of innovation, learning and adaptation	<b>Ability to assess the strategic, reputational and commercial value that involvement in an OBP has for the organisation</b>	<ul style="list-style-type: none"><li>• Engaging in OBPs is not without risk and a service provider should have a clear rationale for doing so that incorporates an understanding of what an OBP is and is not and how it might fit with their broader organisational strategy.</li><li>• Each OBP opportunity is specific to its target population, outcomes and context, and so should be carefully evaluated as to whether involvement in the OBP will be valuable to the service provider and the communities they seek to serve.</li></ul>

### Leadership and decision-making

At this level, senior management are delegating decision-making authority and building the processes that will allow successful adaptive management of delivery across the organisation. The focus of this dimension has therefore broadened to include a wider set of decision makers, compared to the foundational level. Leaders should be empowering their staff and embedding the use of evidence in decision making at every level of the organisation.

Some aspects, such as communication in governance meetings, may still be led by another organisation in the partnership, such as the investor rather than the service provider but it would be expected that this is a collaborative effort and as implementation continues, the service provider(s) may take more of a lead role.

Competency	Illustration
<b>Senior management actively support delivery teams to identify opportunities to improve outcomes</b>	<ul style="list-style-type: none"> <li>• Senior management use their initiative and networks to connect delivery teams to opportunities, be those experts, ideas, technology or resources and in turn empower them to take that initiative as well.</li> <li>• This may include trialling improved performance indicators, collaborating with new technical experts to improve the content of services, using new outreach mechanisms to reach and engage the target population, or innovating in the mode of delivery of services.</li> </ul>
<b>Authority to make decisions is given to the lowest appropriate level</b>	<ul style="list-style-type: none"> <li>• Access to evidence is insufficient to improve outcomes if staff are not able to use it to make decisions within their area of responsibility.</li> <li>• Service delivery decisions should be made as close to the population that is affected as possible, without lengthy approval processes.</li> </ul>
<b>Decision makers at all levels use data and evidence to inform decision making</b>	<ul style="list-style-type: none"> <li>• A culture of evidence-based decision making pervades the organisation, beyond senior management and key data champions.</li> <li>• All decision makers are aware and comfortable with using key performance indicators collected in the MIS to inform their delivery decisions.</li> </ul>
<b>Performance management processes are in place for decision makers and delivery teams</b>	<ul style="list-style-type: none"> <li>• Staff are aware in a general sense of their roles and responsibilities and the expected working culture of evidence-based innovation.</li> <li>• Formal performance management processes are in place and used to drive better programme outcomes but are not necessarily consistently understood and implemented across the organisation.</li> </ul>

Culture of innovation, learning and adaptation

**Senior management attend governance meetings, report on risks, progress and challenges and can identify and advocate for contractual changes if required**

- Within the delivery consortium, some leaders can report on both operational and financial risks to the successful achievement of outcomes, and they understand the links between these.
- Delivery partners can make the case for contractual changes if external circumstances, beyond their control, significantly hamper their ability to deliver, and / or change the underlying logic of the payment mechanism.

## Partnership working

For a delivery consortium, partnership working at this level is about working effectively together, recognising the strengths and roles of each member of the consortium, and using those to have the greatest impact.

As an individual organisation, or as a delivery consortium, they should also have the ability to build constructive relationships with stakeholders who have direct influence on service delivery outside the delivery team. These stakeholders might include local government officials or leaders of service providers implementing programmes in the same region or the same sector, community leaders, and others. These relationships will help service providers to gain approval for programme activities, whether formal or informal approval, and also have early information of any regulatory or other contextual changes which might affect their operations.

Competency	Illustration
<b>Organisation has a clear understanding of their role and competencies relative to other partners and is able to collaborate and work with others to support effective delivery of outcomes</b>	<ul style="list-style-type: none"> <li>• In the delivery consortium, each organisation should recognise their own and others' strengths and responsibilities within the consortium, and use these effectively.</li> <li>• If there is more than one service provider, coordination and lesson sharing will be important to maximising potential impact</li> <li>• If an investor is involved, then it will be important to use their experience strategically to drive better performance.</li> </ul>
<b>Organisation can build and sustain constructive relationships with a broader set of stakeholders with indirect influence over programme delivery</b>	<ul style="list-style-type: none"> <li>• Beyond identifying the individuals with direct influence on programme delivery e.g. by signing off on approvals, organisations can identify individuals or groups with indirect influence e.g. who hold important advisory positions.</li> <li>• As a partnership, organisations can seek out those individuals and groups and build constructive relationships with them such that service delivery is</li> </ul>

informed of and prepared for wider contextual changes.

## Data and evidence

Accurate and relevant data is the cornerstone of evidence-informed decision making and adaptive management. Therefore, at this level this dimension centres on developing the systems to manage and analyse data in a way that is informative for decision makers and that those decision makers have the capacity to understand the data and can use it to improve delivery.

The management information system in an OBP is far more than a reporting mechanism. It needs to connect programme inputs with indicators of the outputs and outcomes that service users experienced so that as data is inputted and analysed, a clear picture is built of where service delivery is succeeding and where there are challenges in the delivery chain. At the same time, the system is only as useful as those who interact with it. Decision makers need to understand the links between the indicators in the MIS and the contractual outcomes in order to adapt service delivery where necessary to maximise outcomes.

	Competency	Illustration
Culture of innovation, learning and adaptation	<b>Management information systems (MIS) allow OBP to connect inputs and activities to outputs and outcomes</b>	<ul style="list-style-type: none"> <li>• Data and evidence in OBPs are needed to inform decisions and adaptive management, they are not just for reporting or triggering outcomes payments. As such, the MIS needs to explicitly link the activities or inputs that each service user participated in, with the outcomes which they experienced.</li> <li>• For example, looking only at the total students enrolled in a class and the total that improved their mathematics scores may not provide granular enough information to understand where to effectively target the next cohort - whether the classes were most effective for girls or boys, those from disadvantaged backgrounds or not etc.</li> </ul>
	<b>Management information data is systematically collected, cleaned and analysed to inform delivery decisions</b>	<ul style="list-style-type: none"> <li>• Processes for collecting and cleaning data are standardised, if not automated so that reliable and comparable data is available and updated on a regular basis.</li> <li>• Data analysis is effective to inform decision making although may not use the most efficient or appropriate tools.</li> </ul>

**Decision makers have a good grasp of the indicators in the MIS and how they connect to the contractual outcomes metrics**

- It is likely that the indicators in the MIS will only proxy the contractual outcomes, which are usually measured independently. Therefore, it is critical that decision makers understand the connections between what can be tracked in the MIS and the eventual payment outcomes.
- Understanding how lower level, more operational, indicators connect to and influence higher level indicators in the MIS, should enable a broad view of delivery performance and where adaptations can be made to influence eventual outcomes.

**Decision makers understand the logical progression from intervention to outcomes and use this to inform changes to service delivery**

- Within each organisation in the consortium there is a strong understanding of the links in the theory of change and how outcomes are driven by interventions, as well as the underpinning assumptions.
- This understanding, along with delivery performance data, informs decision makers as to which links in the chain may not be working and so where adaptations are required.

**Finance and systems**

As with the MIS, the finance system needs to be capable of more than just reporting in an OBP. As revenues are directly dependent on the achievement of outcomes, the organisation or at least one member of the consortium must be capable of developing a financial model that dynamically links the operational and financial sides of delivery. This allows for forecasting, reforecasting and managing of both financial and delivery performance.

At the same time, by producing a single set of figures, a financial model can give the impression of precision when in reality there is considerable uncertainty. It is therefore important to recognise where there is uncertainty in the inputs, be that in terms of cost or outcomes achievement, and so be able to communicate uncertainty in the outcomes. This is generally done through modelling and presentation of different scenarios.

All of the competencies in Finance and Systems dimension at this level can be held at the consortium level, so not every organisation need be capable of these. However if a single service provider is in the partnership, then they will need to be competent across all areas.

Competency	Illustration
<b><i>Ability to develop a financial model that connects delivery costs and anticipated outcomes revenues</i></b>	<ul style="list-style-type: none"> <li>• Within the organisation or consortium, there is the expertise to develop a model that is more than a budget as it explicitly brings the achievement of outcomes into financial planning through assumed inputs, likely achievement rates and so anticipated outcomes revenues.</li> </ul>

***Capacity to link changes in delivery approach to delivery costs, outcomes and anticipated outcomes based payments***

- In the model, expenditure data is aligned to the service delivery structure so costs and effectiveness of programme activities can be compared.

***Capacity to identify potential drivers of cost overruns and / or under-achievement of outcomes and manage this uncertainty appropriately***

- Within the organisation or consortium, there is the understanding of how changes in delivery approach affect costs and likely outcomes achievement rates.
- Using the financial model, this understanding can be translated into forecasts and reforecasts of outcomes revenues so that financial performance can be managed in line with delivery performance.
- Some delivery costs will vary and outcomes achieved may be affected by circumstances outside the control of the delivery organisation or consortium.
- It is important in the organisation or consortium to have the capacity to identify these uncertainties and communicate them clearly within the consortium and across the partnership. This may be supported by modelling different scenarios using the financial model to understand the impact on costs, outcomes and hence outcomes-based revenues.

## 2.3 Embedding outcomes-based delivery

This section describes competencies that service providers may develop during the delivery of OBPs, or may choose to invest in developing if they believe OBPs offer a strong strategic fit.

Competencies at this level start to embed the ways of working associated with OBP into business-as-usual operations.

Here, all the competencies are at the organisation level, not the consortium level, as at this level the service provider is internalising outcomes-based delivery, having acquired the capabilities in levels 1 and 2. It therefore represents a strategic choice from the service provider to make OBPs and their ways of working a central part of how they operate.

The culture of learning, innovation and adaptation is similarly embedded into the business-as-usual operations of the organisation. This means that throughout the organisation learning is valued – the approach to service delivery is humble, understanding that there is always the opportunity to learn and improve through iterative adaptation. Innovation is based on evidence of what is and is not working to deliver outcomes. In this way, the mindset of the whole organisation is centred around the impact that they are trying to deliver but with the flexibility and willingness to learn and improve to achieve it.

### Strategic fit

Reflecting that strategic intent, organisations at this level have the skills and experience to lead others in consortia delivering OBPs. They may also choose to take on more of a leadership role in the field of OBPs, sharing lessons with others and becoming a thought partner for research organisations. This is however not necessary, and they may instead focus on delivery. In this vein, adaptive ways of working, with an outcomes focus at their heart and supported by systems that enable evidence-based decision making, becomes part of the DNA of the organisation and more of an identity than a strategic fit.

	Competency	Illustration
<b>Culture of innovation, learning and adaptation</b>	<b>Organisation is confident in assessing outcomes-based opportunities, forming delivery partnerships, bidding for and delivering outcomes-based opportunities</b>	<ul style="list-style-type: none"> <li>• When senior management and the board judge an OBP opportunity to be strategically valuable, with an acceptable level of risk and potential for high impact, the organisation is confident in leading both the bidding and delivery in this partnership.</li> <li>• They may do this as part of a consortium of delivery partners, including other service providers and investors, and so have the knowledge and confidence to build the capacity of others who may be less familiar with operating in OBPs.</li> </ul>



**Adaptive ways of working to deliver outcomes are embedded across all programmes**

- The focus on impact at the heart of the organisation’s mission has been developed into a focus on delivering outcomes in every programme, regardless of the payment structure of the contract.
- This focus is supported by enabling systems and processes which allow for the generation of evidence to inform decisions, the empowerment of staff to innovate and adapt service delivery and a supportive governance structure which holds decision makers to account.

**Leadership and decision-making**

At this level, competencies which may have previously been held by another organisation in a consortium, are now held by the service provider. A culture of evidence-based decision making extends far beyond the senior management and is embedded throughout the organisation. Decision makers not only seek out the evidence to inform their decisions but also understand its limitations and can adjust decisions accordingly.

There is also a clear articulation of process, both in terms of decision-making processes and in terms of performance management of staff. All staff are aware of and committed to the outcomes-focused culture of the organisation.

	<b>Competency</b>	<b>Illustration</b>
<b>Culture of innovation, learning and adaptation</b>	<b>Decision makers at all levels demand and use data and evidence to inform decision making</b>	<ul style="list-style-type: none"> <li>• Beyond using it when already available, all decision makers actively seek out the relevant data and evidence to inform their decision making.</li> <li>• This may include requests to run bespoke analysis using the MIS or broader contextual information from outside sources but in general decision makers are capable of identifying their need for evidence and understand how to meet it.</li> </ul>
	<b>Decision makers at all levels understand the limitations of available data and can work constructively with it</b>	<ul style="list-style-type: none"> <li>• Decision makers understand the nuances and the limitations of the data they are using, such as how close a proxy indicator is for the outcome of interest, whether there are lags in reporting, or how variable one indicator is from one time period to the next.</li> <li>• Decisions to adapt delivery are therefore proportionate to the level of certainty in the observed trends in the data.</li> </ul>

<p><b>Decision making processes, including access to evidence, are clearly defined and articulated across the organisation</b></p>	<ul style="list-style-type: none"> <li>• The general understanding of the importance of evidence and authority to take decisions close to delivery, which has been built is now codified so that it remains a permanent feature of the organisation, rather than a way of working that is related only to one programme.</li> </ul>
<p><b>All staff are aware of the expectations of them in their role and respond to clearly articulated and consistently implemented incentives.</b></p>	<ul style="list-style-type: none"> <li>• Roles and responsibilities are clearly defined and well understood across the organisation.</li> <li>• All staff are aware of and fully embrace the culture of evidence-based innovation, learning and adaptation.</li> <li>• Performance management processes include the trickle-down of performance incentives from the organisation's main contract in the partnership, where appropriate.</li> </ul>
<p><b>Senior management can identify and effectively advocate for contractual changes if required</b></p>	<ul style="list-style-type: none"> <li>• The organisation has a complete understanding of delivery and financial risks and can make the case for contractual changes if external circumstances, beyond their control, significantly hamper their ability to deliver, and / or change the underlying logic of the payment mechanism.</li> </ul>

**Partnership working**

Beyond building relationships for the benefit of a single programme, the service provider can sustain these for the mutual benefit of the organisation and those stakeholders. The organisation becomes embedded in the ecosystem of the relevant sector and geography, such that they are a trusted partner by government and non-government stakeholders alike. This gives them early insight into any contextual changes and the ability to plan for and mitigate their impacts across their programmes, whether explicitly operating in an OBP or not.

Competency	Illustration
<p><b>Culture of innovation, learning and adaptation</b>  <b>Organisation can build and sustain mutually beneficial relationships with a broad set of stakeholders that sustain beyond individual programmes and support senior management to anticipate contextual</b></p>	<ul style="list-style-type: none"> <li>• Through identifying and building relationships with key stakeholders, the organisation can effectively embed itself in the delivery ecosystem of the relevant context.</li> <li>• It is both a trusted delivery partner as well as an informal strategic advisor and in return benefits from being kept up to date with potential policy or other contextual changes which would impact delivery.</li> </ul>

**changes that may impact outcomes delivery**

- Senior management is able to plan for and successfully mitigate the effects of any of these potential changes.

## Data and Evidence

At this level, the production of indicators and analysis becomes highly efficient. Regularly conducted analysis is automated and likely displayed in visually engaging formats that are easy for decision makers to interact with. Internal capacity also exists to run bespoke analysis, in response to specific questions from decision makers. In turn, decision makers understand the detail of the MIS sufficiently to articulate those questions in a way that can be easily answered by the MIS. Overall, the system should respond to the need for information of decision makers and all staff actively encourage improvements to it to ensure that it provides information that enables maximum impact.

Competency	Illustration
<b>Standard data processes are automated including key analyses that drive decision making</b>	<ul style="list-style-type: none"> <li>• Core data analyses are automated to reduce the manual effort required to update it each time period.</li> <li>• These outputs are likely to be presented in easy-to-understand dashboards which provide a real-time view of performance to inform decision making</li> </ul>
<b>Capacity exists to run bespoke analyses to inform decision making as necessary</b>	<ul style="list-style-type: none"> <li>• Data analysts in the organisation are confident in their ability to construct and run complex or bespoke queries on the data collected, to allow decision makers to dive deeper into particular issues</li> </ul>
<b>Decision makers can articulate questions about delivery effectiveness in ways that the MIS can answer and can suggest improved indicators where appropriate</b>	<ul style="list-style-type: none"> <li>• Decision makers are familiar with what data is collected and inputted into the MIS and therefore what the possible scope of performance indicators is. They are able to put their conceptual need for improved understanding into terms which can be answered by the MIS data.</li> <li>• They are able to work effectively with data analysts to improve the construction of indicators so that they have the most relevance for delivery decisions</li> </ul>

## Finance and Systems

As with other dimensions at this level, competencies which may have previously been held by other members of a delivery consortium should now be held by the service provider. This includes having a finance system that links costs with outcomes so that the two cannot be considered separately, reflecting the fact that all systems should embed a focus on outcomes at their core, at this level.

Finally in line with the confidence to lead a bid for a new OBP opportunity under the strategic fit dimension, an organisation at this level should also be comfortable with estimating the cost of delivering outcomes to include in that bid. This includes relying on their own as well as the experience of potential partners in the consortium to inform service delivery costs, and being able to make reasonable adjustments to estimates based on factors such as the delivery locality or target population changing slightly from previous experience.

Competency	Illustration
<b>Finance systems and processes are designed to systematically link delivery costs with programme outcomes</b>	<ul style="list-style-type: none"> <li>• Beyond a single programme and financial model, the finance systems of the organisation are set up to systematically link costs with outcomes, rather than simply activities.</li> <li>• Outcomes are also placed at the heart of financial reporting which goes beyond simple reports of income and expenditure.</li> </ul>
<b>Costs of delivering contractual outcomes can be calculated or reasonably estimated with a high degree of confidence</b>	<ul style="list-style-type: none"> <li>• Given experience in delivering and measuring outcomes, the organisation understands what it takes to achieve outcomes and using this can estimate future costs of delivering outcomes with confidence.</li> <li>• The organisation understands the nuances between different outcomes and different populations, such as job starts versus job retention, or job starts for men versus women in a traditionally male dominated sector. The organisation can cost delivery to achieve these accordingly. This includes adapting services to slightly changed populations, localities and / or delivery modalities, as the organisation has a thorough grasp of how these changes will affect delivery costs and likely achievement of outcomes.</li> </ul>

Culture of innovation, learning and adaptation

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Social Finance's vision is a fairer world. Where together we unleash the potential of people and communities.

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