

Evaluating community initiatives and programmes using SROI

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CCRI and evaluation

- Track record of LEADER, ERDP, agri-environment and many other evaluations for UK and EU government and NGO sponsors, by a variety of CCRI researchers, 20+ years
- Economic impact studies of Environmental Stewardship and farm building schemes using an adapted **LM3*** approach (led by Paul Courtney with Jane Mills and Pete Gaskell)
- Social Value Act and ensuing interest led Paul Courtney to train in SROI**, 2012

** local multiplier 3-step approach, ** Social Return on Investment method, both pioneered by the New Economics Foundation*

Social Return on Investment (SROI) framework

- SROI Explores, Measures and Values change
- It is stakeholder-driven and focused on outcomes
- It values the ‘things that matter’ to people
- It tries not to over-claim
- Endorsed by the Cabinet Office
- Used increasingly in public, private and especially third sector evaluations

SROI – 3 stages

- Exploring (describing) change through stakeholder consultation - **Theory of Change** to identify outcomes and chain of events
- Evidencing (measuring) change - **Indicators** to measure change in outcomes over time (distance travelled)
- Valuing (*monetising*) change - **Financial proxies** to calculate a ratio of Benefit to Investment, and compare impact across outcomes / themes

CCRI Programme and Project Evaluations using SROI



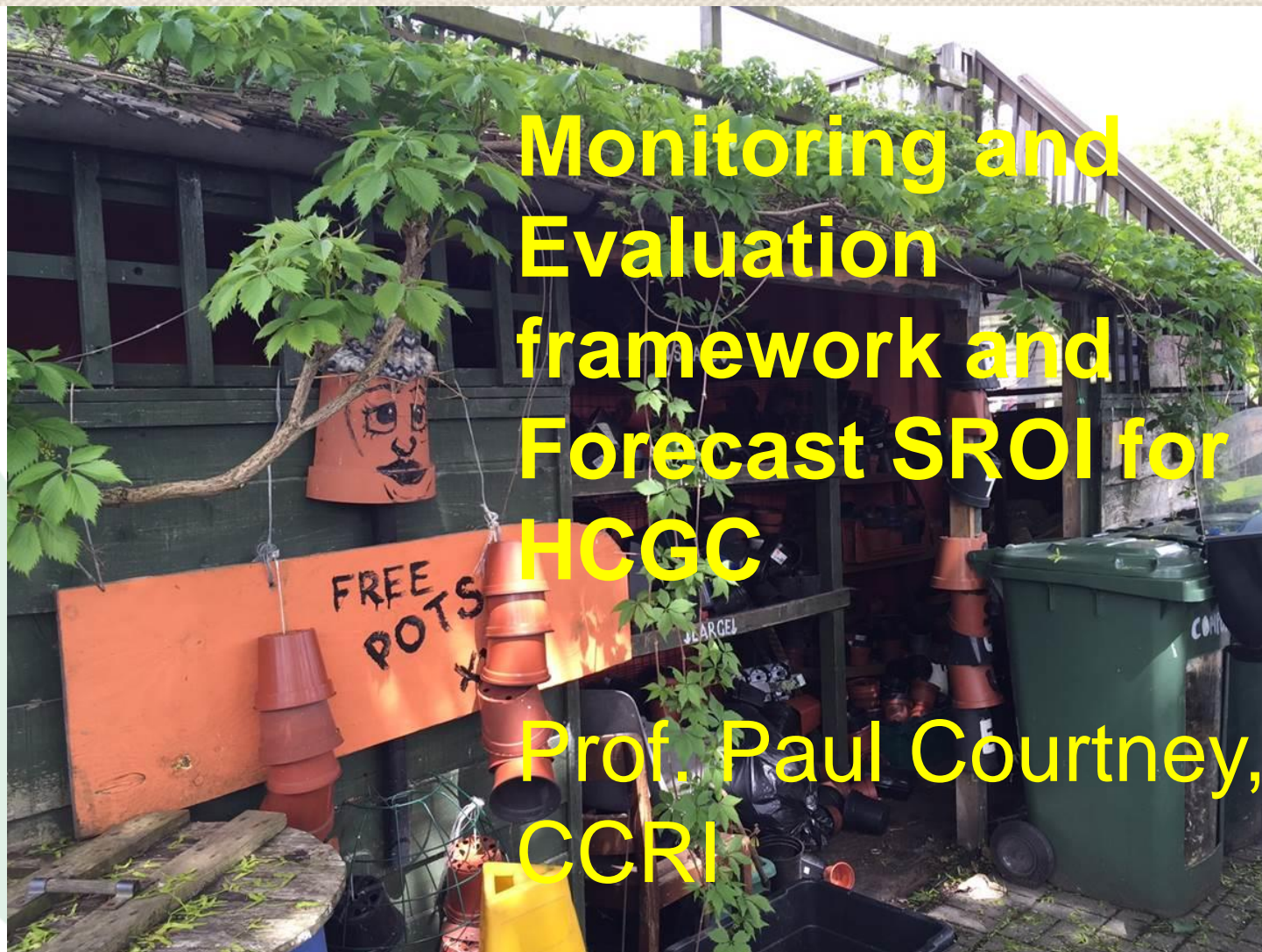
Project	Timing	Funder	Overview
Proving Our Value	2011-13	Lottery (SW Forum)	Action Research to evidence impact of small NGOs and develop impact tools
Evaluation of Axis I and III of the RDPE	2012-13	Defra	Programme Theory and Forecast SROI
SROI: Local Food Programme	2012-13	Lottery (RSWT)	SROI of 3 LF projects and ratio with sensitivity analysis
SROI: Master Gardener Programme	2013-14	Growing Health	Evaluative SROI using longitudinal evaluation data
Monitoring and Evaluation of the Rural Community Energy Fund (RCEF)	2013-16	Defra and DECC	Develop M&E framework; social programme theory; SROI bolt-on to energy Cost-Benefit Analysis
Evaluation: Podsmead Big Local Community	2014-17	Lottery, (Podsmead Cmm. Group)	Theory of change, forecast SROI, data collection tools and updated SROI

CCRI Evaluations using SROI

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Project	Timing	Funder	Overview
Gloucestershire Active Together Programme	2014-16	GCC	Application of SROI to Community Health programme
East Riding Volunteering and Employment project	2014	European Commission	Development of SROI impact assessment tool (With Rose Regeneration)
Fair Shares Gloucestershire	2015-18	Fair Shares	Application of SROI to timebanking; focused around well being and resilience
Monitoring and Eval'n framework, Hulme Community Garden Centre	2015-16	Tudor Trust	Forecast SROI M&E framework and development of outcomes tool.
Validation of CCRI-Hulme Tool	2016	UoG	Statistical validation with sample from Growing Health





Three-fold aim:

- Help HCGC understand its impact and articulate its value through SROI evaluation
- Develop a monitoring and evaluation framework plus an 'outcomes tool' to track ongoing impact
- Provide both HCGC and the Growing Health network with an adaptable and replicable tool to assess the impact of similar organisations /projects



Stages:

- Scoping and Theory of Change to explore and map outcomes (May – Aug)
- Development of tool questions and collection of pilot data to refine them and populate forecast SROI (Sept-Nov)
- Forecast SROI, finalise tool, make recommendations for HCGC and Growing Health (Dec-Feb)

Theory of Change

Interviews,
Storyboard
Workshops

(Videoed)
interviews with
volunteers



Hulme Community Garden Centre

Theory of Change

Consequences

Reduced vulnerability and improved self worth

Improved health and well-being

Increased sense of trust and belonging

More empowered communities and individuals

Community is stronger and more participative

Improved competence, engagement and purpose

Medium to long term outcomes

Strengthened local multipliers

"...Quote..."

Improved confidence

Opportunities for the Local Economy and Environment

Increased local sourcing

Pro-environmental behaviours

Improved Access to Training, Employment and Volunteering

Improved life, work and leadership skills

Increased volunteering

Improved Health, Happiness and Confidence

Increased agency

Improved emotional well-being

Improved exercise and diet

People feel empowered

People feel healthier and happier

Short term outcomes

Re-connection with Nature and the Environment

Increased Social Interaction and Supportive Relationships

Conditions

Pathways

Gateways

Garden Centre Vists and Sales

Volunteering

Well being services

Education, training and outreach

Description

Description



community
institute



Next steps with the method

- Papers currently in process:
 - Re-conceptualisation of social value for NGOs
 - Critique of SROI & its use alongside broader evaluations
 - Framing work in community psychology & innovation
 - Happiness theories, re-framings of social economy & community health
- Refine SROI for use in programme evaluations, wider health programmes
- Apply to private sector and large charities as part of CSR toolkit (i.e. housing, education)
- Statistical validation to standardise and enable wider uptake (potential strong outreach)

Final thoughts

- The value of the method is its attempt to capture what matters to those who directly experience an intervention / programme (not just the pre-conceived goals of funders)
- The steps in the process are as valuable as the monetised outcomes – suggesting causality, discussing additionality, considering deadweight
- The tool can be attractive to small groups, providing a potentially respected validation of their impact using a recognised approach, so long as it is done carefully and by people who understand its implications

BUT

- If used inappropriately, it can produce completely inappropriate figures and ratios: training is important