



SOCIAL RETURN ON INVESTMENT (SROI) EVALUATION REPORT OF THE EMPOWERMENT PROGRAMME

Part of the Social Value Cymru project

*“Having the opportunity to stop and think about myself
and my skills was at times uncomfortable but also
liberating and beneficial as it led to positive actions in
my life.”*

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Executive Summary

The Empowerment Programme supports individuals to build their mental resilience and their confidence to ensure that they become empowered to make decisions in their lives, both in their personal life but also within their working environment or training / education environment. Many of the individuals were surprised with their Mental Toughness Questionnaire Results and through the programme and their mentor, they were able to go through a process of self-realisation allowing them to celebrate the skills they already have, but also identify how they can develop some key areas that will improve how they to deal with stress and challenges.

The project was analysed using the Social Return on Investment (SROI) framework to understand the total value created for individuals who were referred to the programme. The results demonstrate that significant value is created through the Empowerment Programme by providing a bespoke and personalised support service for individuals.

The result of £3.93:1 indicates that for each £1 of value invested, £3.93 of value is created.

There is a growing need for an alternative in our communities to support the growing concerns around mental health, poverty and to improve community cohesion. This model offers individuals the opportunity to create changes in their own lives and to empower them to make positive decisions. Outcomes experienced by clients include **improved mental health, empowerment and increase satisfaction in employment or training**. Through the programme there was a change in their confidence and tools were developed to improve their mental resilience.

Acknowledgements

This report would not be possible without involving key stakeholders to understand what changes have taken place and establish their impact. For those who enrolled on the Empowerment programme, their involvement was key and we're extremely grateful to them for feeding back on their experiences and their willingness to help us understand what happens.

A huge thank you to Jo and the whole team, who is clearly passionate about their work, and their enthusiasm and support to help the individuals was a crucial input in the chain of change. As they are part of the Social Value Cymru shows their commitment to both understand the impact of their work, but to also look at how they can maximise that impact.

Diolch yn fawr / Thank you

1.0 Introduction

This evaluation report will analyse the value of the Empowerment Programme managed by EBTC (Empower – Be the Change) across North Wales part funded by the National Lottery Community Fund in Wales. The impact of this programme on individuals will be considered, but also the value to other potential stakeholders.

Through engagement with the individuals receiving support and the organisation, the available information and data was examined, and appropriate estimations made, which was further supported by secondary evidence.

The report will initially set out the background of this programme, followed by a discussion of the Social Return on Investment (SROI) framework used to evaluate the service. The SROI results will then be discussed in detail to explain the ‘story of change’ and value for key stakeholders. The report will look at the social value created for activities from April 2018 and until April 2019.

1.1 Background & Context

Key Organisation(s)

EBTC is a social enterprise based in Wrexham delivering programmes and services across North Wales. EBTC combines accredited soft skill training with volunteering and mentoring to create better skilled, better qualified, confident empowered individuals.

EBTC delivers 3 bespoke programs as listed below¹, but this analysis will focus on the first, the Empowerment Programme.

¹ <https://empower-bethechange.org/programmes>

1. Empowerment Programme: targeted at NEETs (of all ages), schools and colleges. Individuals complete a soft skill assessment (mental toughness), ILM level 2 Effective Team Member Skills, and receive mentoring support to empower them into education, employment, training or volunteering.
2. Empowered leaders programme; targeted at individuals progressing from the empowerment programme, professionals in a team leader role and/or professionals wanting to develop their leadership skills further. Individuals complete soft skill assessments (Mental toughness and leadership), ILM level 2 in Leadership and Team Skills and receive mentoring support.
3. Mentor program: targeted at individuals progressing from empowerment programme, professionals responsible for supporting volunteers and NEETs, university students and community leaders. Individuals complete soft skill assessments (Mental toughness and leadership), ILM level 3 in Management of Volunteers and receive mentoring support.

Project Outline

This evaluation has been undertaken as part of the Social Value Cymru project managed by Mantell Gwynedd and led locally through Association of Voluntary Organisations in Wrexham. The focus of the project is internal decision making, and therefore this report will mainly focus on the value to those who matter the most – our clients / beneficiaries. These results will then be used as a baseline for the board to embed social impact measurement to inform their decision making.

In April 2018 EBTC secured £246,000 from the Big Lottery People and Places fund to expand its project: Qualified, Resilient, Empowered across North Wales. Over the next 5 years EBTC aim to empower over 1500 people through the delivery of its programmes.

For the purpose of this project EBTC seeks to work across North Wales to increase the mental resilience and employability of young unemployed individuals (16-25), unemployed individuals over the age of 25 and young people aged 15-24 in education. In doing so, EBTC aims to address issues of poverty, unemployment and community cohesion which is caused by a lack of soft skills in individuals, which enable them to effectively cope and self-manage without a reliance on government and other support services.

The specific barriers for the groups and individuals EBTC work with are identified as the following:

- Lack of confidence and soft employability skills escalated by bad experiences and mistreatment within a work setting.
- Lack of self-belief, resilience and self-management skills escalated by sudden change in circumstances such as redundancy.
- May lack qualifications or have minimal qualifications.
- Lack relevant work experience.
- Reliance on government benefits and short term funded interventions.
- Pressured to follow a conventional route that is not relevant or appropriate for themselves. In doing so individuals may be in education and employment but are at risk of disengagement because of a lack of fulfillment in this role. Young people are particularly susceptible to engaging in anti-social behavior, drug/alcohol misuse and social isolation in a bid to fill gaps.

- Susceptible to mental health issues as they do not have the skills and know how to self-manage outside of dictatorial educational settings.

This analysis looks specifically at the Empowerment Programme which is an ILM Level 2 qualification. All participants take part in a Mental Toughness Questionnaire² which looks at how individuals deal with stress, barriers and challenges. The measurements consider how we feel and how we act and allows us to identify more about our personalities. According to the research behind this questionnaire, there are four key elements of our mental toughness which are control, commitment, challenge and confidence. Having completed the questionnaire there will be a Development Report produced, which provides the score along with an explanation of what that may mean. The report will also give some development points on how they can change their mental toughness, and alongside this, the programme and the mentoring the programme can support individuals to make changes.

Identifying the need

The project has been set up to address the following direct needs across all 3 groups:

1. Empower individuals to make informed choices and develop the skills to be able to implement these. Remove reliance on government benefit and services.
2. Increase individual's self-management and resilience; reducing the likelihood of mental health issues.
3. Increase access to appropriate and relevant work experience and work placement opportunities

² <https://agrinternational.co.uk/mtq48-mental-toughness-questionnaire>

EBTC has prioritised tackling the primary issues of mental resilience, poverty and community cohesion for the following reasons:

Mental resilience

- Young people are increasingly forced down a conventional educational route driven by academic achievement and results. There is little if any focus on developing soft skills.
- The lack of soft skill focus directly contributes to lack of self-confidence, feelings of low self-worth and reliance on schools, agencies and other organisations to make decisions for young people which may not necessarily be right for the individual.
- By working with young people from an early age to develop mental toughness/resilience strategies and creating greater self-awareness we will be creating individuals who will be well equipped to deal with changes in modern society and better able to respond to the skill set required by employers.
- By working with individuals that are out of education, employment or training (of all ages) and developing their skills to better self-manage, make informed decisions and implement coping strategies that are right for them EBTC not only achieves a short term intervention of reducing the number of unemployed people but also ensures people are more likely to stay in work and/or know how to cope if they find themselves out of work without defaulting to the support of government agencies.
- Creating more empowered individuals has a direct and positive knock on effect to family members, friends and peers.
- There is an increasing prevalence and awareness of mental health illnesses with a reduction in direct support. By increasing individual mental resilience at a preventive stage, individuals are far less likely to experience mental health illnesses and if they do

will be better placed to self-manage until professional support (if necessary) becomes available.

Poverty

- Poverty is not just about financial hardship but about poverty of opportunity. The lack of opportunity can affect any body at any time and can have a profound effect on an individual's financial status, well-being and self-esteem.
- Financial poverty; often caused by unemployment or a lack of confidence/skills/experience to secure a job that an individual is well placed to do. EBTC programmes directly increase employability skills and provide the right opportunities to gain experience and skills in the role for which the individual is best placed to do.
- Financial poverty, EBTC programmes complement and work with agencies that support individuals on government benefits and help to shift people into independence without it having a detrimental effect on the financial security they have developed from benefits.
- The majority of the individuals EBTC work with are from low socio-economic backgrounds and our programmes help to increase employment amongst this group. This has the potential to break the cycle of families who for generations have relied on government benefits as they see family members thriving and being better off in work.
- EBTC is able to secure both grant funding and sell our programmes to agencies which means any individual is able to take part and benefit from our programmes.

Community cohesion

- Lack of community cohesion is caused by issues of poverty and a lack of understanding/appreciation of others. This can be escalated by a lack of self-worth and confidence. Individuals are far more likely to raise issue with individuals where there is

fear and resentment caused by a perception of what the other individuals/groups are about. A lack of self-confidence and belief about their own standing (perhaps bought on by unemployment and/or lower socio-economic status) can lead to individuals isolating, bullying, harassing and discriminating against individuals that are seen to be “different” to them.

- In 2009 the percentage of individuals from BME communities stood at 4% in North Wales. Whilst this number is increasing it is still relatively low.

The low % highlights the importance for greater integration and understanding between different groups as the incidence for isolation is far greater than in major cities where large populations of individuals from similar ethnic groups will more readily set up their own support networks and communities.

EBTC seeks to work directly with projects such as GO Wales and BME agencies to recruit individuals to our programmes and support them into relevant community placements.

- EBTC training courses directly address this through frank and open discussion with course participants about the potential causes of conflict and how they can overcome this through their own interventions. This gives individuals the skills and knowledge to not only deal with potential conflict they are caught up in but also prevent conflict from happening in their own communities.

EBTC has neither linked with or is aware of any other organisation that combines accredited training and mentoring to provide a bespoke and highly personalised support service to individuals. No other organisation is able to be so flexible in the range of people that it works with and the way support is offered.

Existing services focus on processing people through a set programme rather than a personalised approach which directly addresses the personal needs of the individual.

- Many existing services have complicated referral criteria which individuals do not understand or know how to access.
- Many existing services insist that individuals on their programmes cannot access other services, this is particularly true of European Social Fund projects; individuals only receive support for one specific aspect.
- Many existing services focus on hard skills, CV writing and job searches and whilst these are critical many of the individuals, we spoke to felt they also needed to develop their skills and confidence to do this for themselves.
- All individuals would rather gain relevant practical experience of a role rather than enrol in long term and time commitment heavy training courses.
- Individuals want to access a programme/support that works around their existing commitments

Whilst EBTC programmes have not been set up to directly address issues of mental health, EBTC recognises the prevalence of mental health issues both in the general population and specifically in the groups that we work with. EBTC has strong connections with a number of mental health charities and works with them to seek advice and guidance on how to integrate key messages and training into our courses, to ensure delivery staff feel comfortable and confident supporting individuals who may confide in them and that our programmes seek to increase people's resilience to better self-manage.

Overall, the project will focus on the provision of employability, working with unemployed people, increasing the skills of employed people to keep them in employment and increasing resilience in young people in education to enable them to make better informed decisions and choices.

An increasing need to support those with mental health issues is recognised, and the Welsh Government prepared a 'Together for Mental Health Delivery Plan 2016–2019'³ as a response to this need. In response to the strategy, north Wales developed their own 'Together for mental health in north Wales strategy'.⁴ In the BCUHB Three-year strategy it is stated, "Mental well-being is concerned with how people feel about their lives and whether their lives are worthwhile. It is not just the absence of mental health problems – it is broader than that. It is about how much control someone feels they have; resilience and support networks; participating and being include."⁵

A number of the actions in this Plan are a response to the Social Services and Well-being (Wales) Act 2014⁶ which transforms the way Social Services are delivered. This also is a response to the Well-being of Future Generations (Wales) Act 2015⁷ which aims to:

- Think more about the long-term
- Work better with people and communities and each other
- Look to prevent problems and take a more joined-up approach.

One of the fundamental principles of the Social Services and Well-being (Wales) Act 2014 is prevention and early intervention. With the focus on empowering individuals and supporting individuals to be more resilient, there is a focus on preventing from developing further

³ Welsh Government (2016). <http://gov.wales/docs/dhss/publications/161010deliveryen.pdf>

⁴<http://www.wales.nhs.uk/sitesplus/documents/861/Together%20for%20Mental%20Health%20in%20North%20Wales.pdf>

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⁶ Welsh Government (2016) <http://gov.wales/topics/health/socialcare/act/?lang=en>

⁷ Welsh Government (2016) <http://gov.wales/topics/people-and-communities/people/future-generations-act/?lang=en>

mental health illnesses, but also will have an impact on other stakeholders such as friends, family, community and the employment sector.

2.0 Social Return on Investment (SROI) Framework

By explicitly asking those stakeholders with the greatest experience of an activity, SROI is able to quantify and ultimately monetise impacts so they can be compared to the costs of producing them. This does not mean that SROI is able to generate an 'actual' value of changes, but by using monetisations of value from a range of sources it is able to provide an evaluation of projects that changes the way value is accounted for – one that takes into account economic, social and environmental impacts. Social Value UK (2014) states;

'SROI seeks to include the values of people that are often excluded from markets in the same terms as used in markets, that is money, in order to give people a voice in resource allocation decisions'

Based on seven principles, SROI explicitly uses the experiences of those that have, or will experience changes in their lives as the basis for evaluative or forecasted analysis respectively.

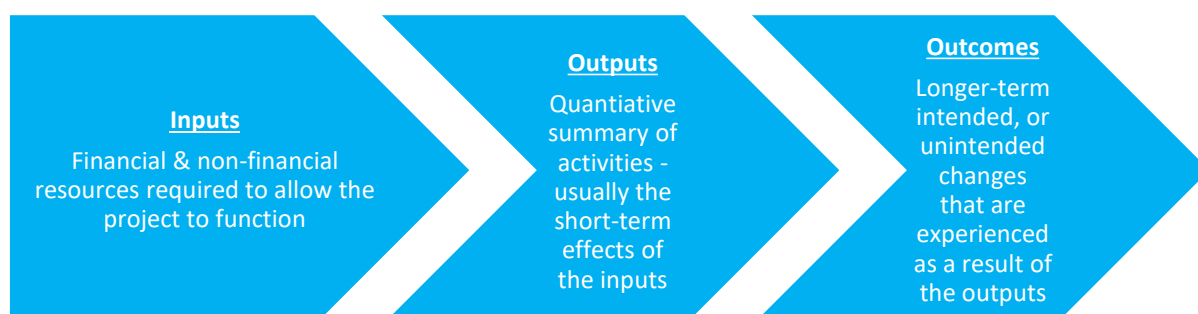
Social Return on Investment Principles

1. **Involve stakeholders** Understand the way in which the organisation creates change through a dialogue with stakeholders
2. **Understand what changes** Acknowledge and articulate all the values, objectives and stakeholders of the organisation before agreeing which aspects of the organisation are to be included in the scope; and determine what must be included in the account in order that stakeholders can make reasonable decisions
3. **Value the things that matter** Use monetisations of value in order to include the values of those excluded from markets in the same terms as used in markets
4. **Only include what is material** Articulate clearly how activities create change and evaluate this through the evidence gathered

5. **Do not over-claim** Make comparisons of performance and impact using appropriate benchmarks, targets and external standards.
6. **Be transparent** Demonstrate the basis on which the findings may be considered accurate and honest; and show that they will be reported to and discussed with stakeholders
7. **Verify the result** Ensure appropriate independent verification of the account (socialvalueuk.org)

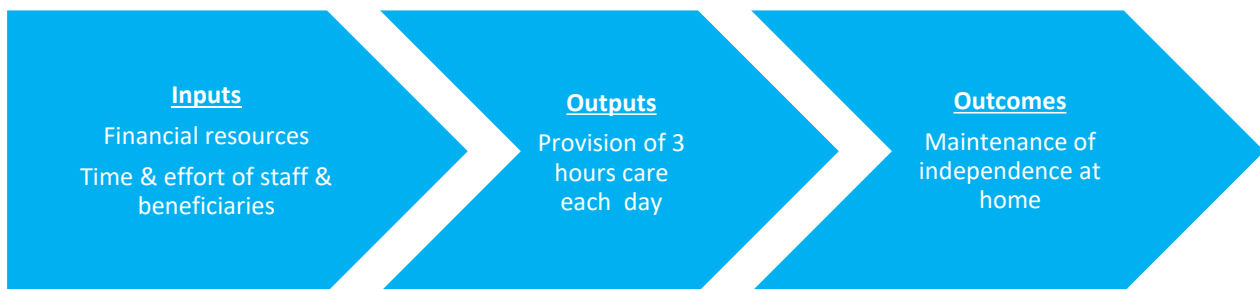
The guiding principles ensure that *how* value is accounted for remains paramount. To ensure a consistent approach is used, chains of change are constructed for each material stakeholder explaining the cause and effect relationships that ultimately create measurable outcomes. These chains of change create the overall Value Map (attached separately as appendix 6), and these stories of change are equally as important as the final result of analysis. In fact, SROI is best thought of as a story of change with both quantitative and qualitative evidence attached to it. Figure 2 summarises the different elements for each chain of change included within the SROI analysis (before the impact of outcomes is calculated).

Figure 2 – Outline of the Chain of Change



SROI is an outcomes-measurement approach, and only when outcomes are measured is it possible to understand if meaningful changes are happening for stakeholders. To illustrate this idea, figure 3 displays a brief theory of change for a domiciliary care programme to assist people to remain in their own home - only by measuring the final outcome, is it possible to understand the impact of the care-programme.

Figure 3 - Example Chain of Change –



As will be discussed at the point of analysis, SROI also incorporates accepted accounting principles such as deadweight and attribution to measure the final impact of activities that are a result of each particular activity or intervention. Importantly, SROI can capture positive and negative changes, and where appropriate these can also be projected forwards to reflect the longer-term nature of some impacts. Any projected impacts are appropriately discounted using the Treasury’s discount rate (currently 3.5%). The formula used to calculate the final SROI is;

$$\text{SROI} = \frac{\text{Net present value of benefits}}{\text{Value of inputs}}$$

So, a result of £4:1 indicates that for each £1 invested, £4 of social value is created

Overall, SROI is able to create an understanding of the value of activities relative to the costs of creating them. It is not intended to be a reflection of market values, rather it is a means to provide a voice to those material stakeholders and outcomes that have been traditionally marginalised or ignored. Only by measuring impacts are organisations able to not only demonstrate their impacts,

but also importantly improve them. This thereby strengthens accountability to those to which they are responsible, which in the third sector is fundamentally the key beneficiaries of services.

3.0 Stakeholder Engagement & Scope of the Analysis

Including stakeholders is the fundamental requirement of SROI. Without the involvement of key stakeholders, there is no validity in the results – only through active engagement can we understand actual or forecasted changes in their lives. Only then can SROI value those that matter most.

In order to understand what is important for an analysis, the concept of materiality is employed. This concept is also used in conventional accounting and means that SROI focuses on the most important stakeholders, and their most important outcomes, based on the concepts of relevance and significance. The former identifies if an outcome is important to stakeholders, and the latter identifies the relative value of changes. Initially, for the evaluation of the Empowerment Programme, a range of stakeholders were identified as either having an effect on or being affected by the project – table 1 highlights each stakeholder, identifying if they were considered

Materiality

If a stakeholder or an outcome is both relevant & significant, it is material to the analysis. Being important to stakeholders and of significant value, means that if the issue was excluded from analysis it would considerably affect the result.

Table 1 – Stakeholder List & Materiality

Stakeholder	Material stakeholder?	Explanation
Individuals	Yes	As key beneficiaries of the service these are the most important stakeholders and some changes experienced will be both relevant and significant.
Family members	No	Family members are likely to experience some positive impact and changes experienced will be both relevant and significant.
Empower – Be the Change	Yes	Provides material inputs of finance, skills and other resources to ensure the strategic direction of the project, so must therefore be included.
Employers	No	Many of the beneficiaries reported feeling more confident in their own abilities and had improved their skills since attending the programme. It is possible therefore that both current employers and future employers have experienced changes but will be beyond the scope of this report.
Schools	No	As above, the schools will possible experience possible changes a as result of student feeling more confident but will not be measured in this report.
NHS	No	Many experienced positive changes in their mental health. The potential impact on health will be considered but is unlikely to be significant.

Department of Work and Pensions	No	As the aim of their work is to support to create better skilled, better qualified and better confident empowered individuals it is likely to have an impact on supporting people into employment or maintain in employment. However, they will not be included in this report as it is beyond the scope of this analysis.
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Having identified the material stakeholders for analysis, table 2 highlights the size of the populations, the sample size engaged with and the method of engagement.

Initial discussions were held with the Innovation Lead to understand the scope and potential list of stakeholders. Further activities were held as part of the Social Value Cymru project to do further stakeholder mapping and to start to identify any potential characteristics that can possibly provide some insights in the results.

Engaging with the individuals themselves is essential so ensure we adhere to the principle 1 of SROI which is involving stakeholders and then through them we can get a better understanding about the outcomes. All qualitative data was gathered by either a focus group or one to one interviews depending on the appropriate method. There are different ways of engaging with stakeholders and gathering qualitative data, and each option offers different advantages and disadvantages.

Although a great deal of thought was given to the questions being asked to the individuals about their experiences, in order to adhere to the SROI principles and to understand what had changed, a loosely structured approach was taken that allowed them to tell us what happened as a result of the support given by the organisation. The added flexibility of semi-

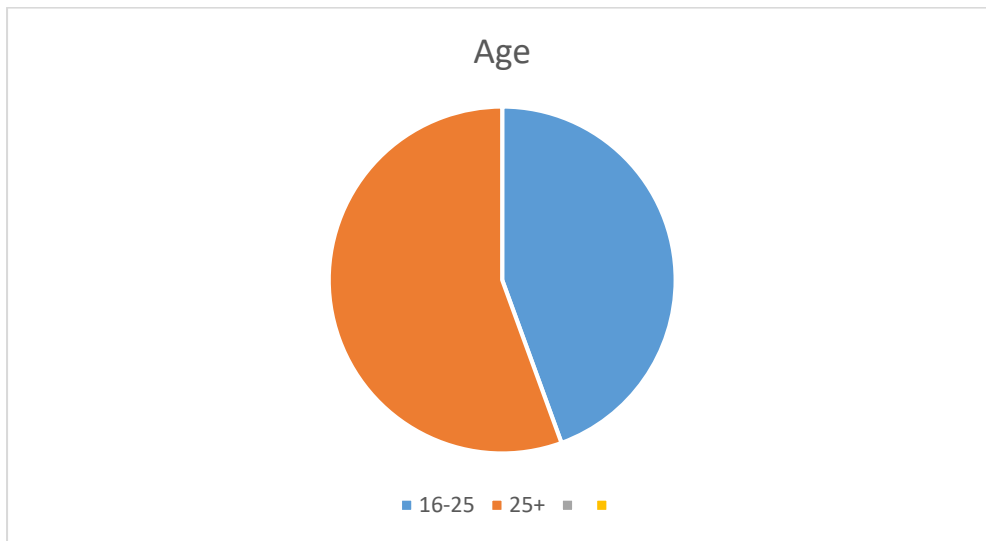
structured probing questions, such as asking people what they now do differently because of the change they had experienced, how long they believe the change will last, and importantly if they had any negative experiences allowed them to tell their story from their own perspective. The focus groups lasted approx. 60 minutes with the face to face one: one interview and the phone interview lasting approx. 30. Minutes. The participants were extremely open and was eager to speak about their experiences. They were also able to provide an insight into what had changed for them, but also what they think might have happened without the service and the possible difference it would have. Questions were also asked around impact such as who else contributed to any changes, and would they have support from somewhere else if this service wasn't available.

Unlike quantitative methods, qualitative interviewing does not have a statistical method for identifying the relevant number of interviews that must be conducted. Rather, it is important to conduct sufficient number until a point of saturation is reached – this is the stage at which no new information is being revealed.

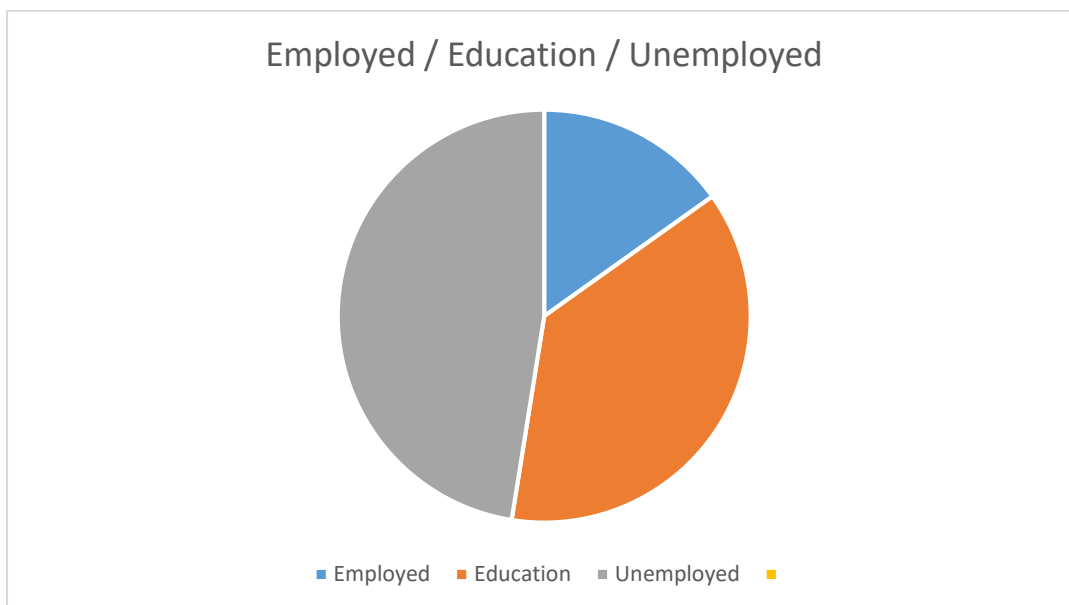
Potential Subgroups of Stakeholders

It's important to recognise that not all individuals are the same. Understanding if different characteristics have an impact on the data can help us to manage and inform decision making. Consideration is therefore given to the different characteristics below, which are age, employment status, and whether they have any reported disability or mental health concerns. The diagrams below demonstrate the groups represented in this project.

Age



Employed / Education / Unemployed



Mental health

24% declared that they have a mental health condition and 44 % reporting to have a disability which includes either a learning disability, physical disability or both.

Table 2 provides a summary of the stakeholder engagement process. There are 10 individuals who were representative of the different subgroups identified below as well as 24% of individuals who took part in the survey.

Table 2 – Stakeholder Engagement

Stakeholder	Population size	Method of engagement
Individuals	99	1 x focus group at Glyndwr University (2 in attendance) 1 x focus group at St Christopher’s School (6 in attendance) 1 x one to one interview 1 x phone interview 24% of individuals completed the survey
Empower- Be the Change	1	Many meetings with Founder & Innovation lead and the team.

4.0 Project Inputs

This section of the report describes the necessary inputs from multiple stakeholders. Some inputs are financial, whereas others are not – yet where possible inputs are monetised.

Individuals

This service is free to those that receive it, but some non-financial inputs are also necessary to ensure any changes. Their time and willingness to travel to the venues is important for some, where for others the programme was provided in their usual place of work or education provider. Including the contribution of the travelling could be considered, however, they have been excluded here.

It was acknowledged that at times it could be an emotional experience, and therefore their willingness to engage was important as well as their willingness to acknowledge and be opened minded about the results of the MTQ. Some individuals explained how anxious they were about the results but had often been surprised. At times they needed to confront the results and acknowledge what areas they needed to focus on to improve their confidence or resilience.

An example of the results in the MTQ development report are;

“You may not really feel you are in control of your destiny, but rather you are more at the mercy of what is happening around you.”

The report is clear that they don't need to accept all of the results, but it is still important to acknowledge their trust and willingness to consider these results are important.

Empower – Be the Change

The financial input is managed by EBTC with secured £246,000 from the Big Lottery People and Places fund over five years. As well as funding from the Big Lottery, EBTC also received other

grants or income for their programmes. For this analysis the financial input for April 2018 – April 2019 is £92,167 which includes funding from;

- £68,826 from lottery
- £3,430 from Children in Need
- £19,900 from Remploy and Glyndwr.

This income pays for the salary of 3 staff members, including administrative support, management and resources.

The relationship with the referral agents is also important to specify. Many of the participants were referred through Remploy or through St Christopher's school. A good working relationship and on-going support was important to ensure any changes were sustainable, but also to ensure an understanding of the impact, looking at the positive changes, but also allowing room to understand what could be better or if some individuals would need further support.

The skills by the staff was crucial – the participants explained how they made them feel at ease and really had the ability to motivate them and made them feel better about themselves.

Total monetised inputs

The total inputs for the project over the one-year period have been calculated as £92,167 created by both financial and non-financial inputs from the range of stakeholders above. This information is displayed in table 3 and is compared to the costs per individual befriended (whatever the key stakeholder is you can identify the input value per key stakeholder).

Table 3 – Total Monetised Inputs for Empower – Be the Change

Stakeholder	Financial input	Non-financial input	Cost per individual
Individuals	N/A	Willingness to take part and take action identified with the MTQ results and action plans	N/A
Empower – Be the Change	£92,167	Strategic management, time, expertise	£930
Totals	£92,167		

5.0 Outputs, Outcomes & Evidence

The immediate outputs for the Empowerment Programme, is the number of referrals made to the service and how many hours of support each person received from the programme. From 4th April 2018 until 5th April 2019 there were 99 participants who completed the programme.

EBTC works with a number of schools, Glyndwr University, OPUS, Remploy, Job Centre and community groups. A high percentage of their referrals will come from Remploy who supports people with a disability or health condition to boost their confidence and motivation into work. EBTC also works very closely with St Christopher’s school in Wrexham, and one of the focus groups was held in the school with young people 16-18-year olds. To understand

the success of any project, we must understand the outcomes experienced by the participants, in this project those are the people attending the Empowerment Programme. Outcomes are those things that change and are sustainable. Table 4 below summarises all the stakeholders, their outcomes considers their materiality. Consideration is given to what will be included and excluded and can then be seen in the Theory of Change.

A full Theory of Change can be seen in Appendix 1, and those that are highlighted in green are those included in the value map. To ensure we are not over claiming, it is only those final three outcomes that are given a value. However, this section will look at each stage to understand the importance of every step in the client journey, and to recognise the indicators for these changes. Consideration will also be given to potential negative outcomes.

Stakeholder	Outcomes	Included / Excluded	Materiality test	Indicator
Individuals	Increased self –realisation	Excluded	This was relevant to most stakeholders; however, this is an intermediate outcome that leads to the well-defined outcomes	
	Increased confidence to take control in work or social situations	Excluded	This was relevant to most stakeholders; however, this is an intermediate outcome that leads to the well-defined outcomes	
	Increased mental resilience	Excluded	This was relevant to most stakeholders; however, this is an intermediate outcome that leads to the well-defined outcomes.	
	Improved skills and qualifications	Excluded	This was relevant to most stakeholders; however, this is an intermediate outcome that leads to the well-defined outcomes	
	New employment / training opportunities	Excluded	This was relevant for many stakeholders; however, this is an intermediate outcome that leads to the well-defined outcomes	

Feeling valued	Excluded	This was relevant to most stakeholders; however, this is an intermediate outcome that leads to the well-defined outcomes	
Improved home life due to reduced stress and anxiety	Excluded	Some stakeholders explained that the programme had a positive change on home life due to having reduced stress, however, this was not relevant to all stakeholders.	
Feeling empowered to make decisions	Included	This was relevant to all stakeholders during the qualitative stages, and the quantitative data demonstrated a lot of change	Qualitative: Individuals making changes such as new work positions, taking on more responsibilities. Quantitative: Questionnaire results and MTQ results
Improved mental health	Included	This was relevant to all stakeholders during the qualitative stages, and the quantitative data demonstrated a lot of change	Qualitative: Individuals spoke about dealing better with anxiety levels. Increased confidence in self made them feel more positive. Quantitative: Questionnaire results and MTQ results

	Increased satisfaction with current job / training/ role	Included	This was relevant to all stakeholders during the qualitative stages, and the quantitative data demonstrated a lot of change	<p>Qualitative: Many spoke about big changes such as new employment or new volunteering experiences. Many expressed feeling more confidence in their own skills about what they can contribute.</p> <p>Quantitative: Questionnaire results and MTQ results</p>
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Material Outcomes for each stakeholder

5.1 Individuals

Outcome 1 – Feeling empowered to make decisions

As the title suggests, the aim is to support people to become more empowered to make positive changes in their own lives. The organisation believes that by empowering individuals they can bring out the best in themselves, but also in their communities. This can also open doors for them to employment, education and qualifications.

For many, attending the programme and looking at the MTQ results was a process of self-realisation, allowing them to identify what skills and abilities they did have which empowered them to make decisions about their own lives.

“Since completing the course I have begun going to Slimming World and will be doing some other groups like Salsa. It showed me how to take my ‘controlling’ aspects and turn them into positives. I feel so much better.”

During the qualitative interviews, there were many examples of individuals doing things differently now that they didn’t perhaps have the confidence to do before. This included applying for new jobs, leading group activities, or joining new clubs. Some had also applied to study as they felt the course gave them the ‘push’ they needed.

“I believe in myself a bit more.”

The young students in St Christopher's also showed how more empowered they felt about making decisions about the future due to the support they'd received. The staff had noticed a big change in the confidence of some student as well as changes in overall results.

The development report from the MTQ questionnaire results, as well as the programme and the mentoring supported individuals to make some changes. An example of one of the actions in the MTQ report was;

“Development suggestions:

Visualise to see yourself making a real difference. Use positive language e.g. “I will do...”

Remind yourself repeatedly that what you do really matters.

Recognise the difference between the things that can be controlled by you, the things that you can influence, and the

things completely outside your control. Don't try to control the uncontrollable.

Relaxation techniques may help you cope effectively with very stressful events”

These suggestions along with the mentoring gave the individuals the tools to empower themselves to make decisions.

Outcome 2 – Improved mental health

The Mental Toughness Questionnaires considers how individuals deal with stress, pressure and challenges. It considers our mental resilience but can also look at our mental health, stress and anxieties.

Many of the individuals explained how the programme allowed them to have the tools and understanding of how to deal with different situations, perhaps differently to how they would have previously.

“I feel as though I now have tools to approach and deal with stressful situations head on. A better outlook/perspective on challenging situations and ways to approach them.”

Some of them commented on how beneficial it was for them to see the changes over months in their MTQ results, and how they could identify the changes in themselves.

Some of the participants had gone on to do things that they previously believed were not possible. There were case studies of individuals going to University, going into full time employment, and for some it was also staying in employment. These personal changes made them realise the skills that they have to contribute, but also made them more resilient to deal with difficult situations differently to how perhaps previously would cause much stress and anxiety.

Outcome 3 – Improved satisfaction with current job / training / role

There was a big variety of situations in terms of the clients. Some were employed, others were in full time education and others were unemployed and came through Remploy.

One person explained how she was unhappy in past employment and felt that she wasn't appreciated for the work that she did and was made to feel that she didn't have skills to contribute. This situation contributed to a lot of stress and anxiety which then had an impact on her home life. Since being involved with the organisation, she felt more confident in herself and realised that she did have skills to contribute. She now has a new role and felt her life has improved so much in work, but also at home because of the reduction in stress and feeling more satisfied with her work.

“Everything has gone from strength to strength”

“It highlighted what I was capable of”

“It gave me confidence to grow”

Many felt that the programme had helped them to increase their confidence in themselves and confidence to achieve what they wanted to achieve from their work or education.

“The reflective side of the course is probably what I took the most from. Having the opportunity to stop and think about myself and my skills was at times uncomfortable but also liberating and beneficial as it led to positive actions in my life.”

In the quantitative results from the survey, 100% of those who took part experienced some positive change with the distance travelled varying from 51% to 59% for different stakeholder groups. However, adhering to the principle of not over-claiming, the results will only consider positive results for 60% of clients.

6.0 Valuing Outcomes

The difference between using SROI and other frameworks is that it places a monetary value on outcomes. By using monetisation, it allows us to not only give the story of what's changed in people's lives, but also allows us to put a value on those changes so we can compare costs and outcomes. This is not about putting a price on everything, but it allows us to demonstrate what impact the service has on other stakeholders, and the possible savings an intervention can create. It also goes beyond measuring and allows organisations to manage their activities to ensure the best possible impact is created for those that matter to them the most: the individuals on the Empowerment programme.

Impacts of Empowerment Programme

SROI analyses use accepted accounting principles to calculate the overall impact of activities. Taking into account any deadweight, attribution, displacement and drop-off factors, means that SROI analyses will avoid over-claiming value that is not a result of the project Empowerment programme activities. The boxes below outline each of the impact factors.

Deadweight

This asks the likelihood an outcome could have occurred without an activity taking place. So for example if it is believed that there was a 10% chance that someone could have found work without a training programme, the value of that outcome is reduced by 10%.

Attribution

Considers what proportion of an outcome is created by other organisations/individuals, so can therefore not be legitimately claimed by the SROI analysis. For example, if external agencies also support someone receiving training, that organisation is responsible for creating some of the value, not just the training organisation.

Displacement

This asks if an outcome displaced similar outcomes elsewhere. This is not always a necessary impact measure yet must be considered. For example, if a project reduces criminal activity in one area, which results in increases in other locations, there is a need to consider the displaced outcomes.

Drop-off

Outcomes projected for more than one year must consider the drop-off rate. This is the rate at which the value attributable to the focus of the SROI analysis reduces. For example, an individual who gains employment training may in the first year of employment attribute all of the value to the training organisation, but as they progress in their career less value belongs to the initial initiative owing to their new experiences.

Individuals

There are a range of approaches to monetise outcomes including using financial proxies – that is using a market-based alternative as an approximation of a stakeholder’s value. However, some would argue that these do not represent the value that the particular stakeholder with experience of the change would attribute to it. Therefore, where possible, this analysis has applied the first SROI principle to involve stakeholders as much as possible. During the qualitative interviews, following an understanding of the changes and the outcomes gained, clients were asked to rank and rate their outcomes. Therefore, they were asked to put their outcomes in order of importance, and then to rate their importance out of 10. In the quantitative data, individuals were also asked to confirm their importance of any changes in the survey. This is where we stopped with their involvement in valuing their outcomes and when it comes to placing a monetary value of their outcomes it was decided to use other techniques other than the value game. The value game identifies their material outcomes, and asks them to prioritise, and subsequently value them against a list of goods or services available on the market to purchase. However, it was decided that using well-being valuations was more appropriate for this analysis.

The weighting of the values is summarised below;

Table 5 – Weighting of the outcomes

Stakeholder group	Outcomes	Average Weighting
Segment A – In education	Increased satisfaction from job / training / role	8.5
	Improved mental health	8

	Feeling empowered to make decisions	6.5
Segment B - employed	Feeling empowered to make decisions	9.5
	Improved mental health	8.5
	Increased satisfaction from job / training / role	8.5
Segment C – Unemployed	Increased satisfaction from job / training / role	9
	Improved mental health	9
	Feeling empowered to make decisions	8

Segment A and C had the same ranking for the outcomes, however, for segment B the outcome ‘feeling empowered to make decisions’ was more important. Many said how their confidence had grown in the workplace and in their own abilities. It is interesting that for segment C – who were unemployed that the most valuable outcome was satisfaction from employment, role or training but equally as important as improved mental health. Some of the individuals had gone on to employment, but for many it was the most important change that they wanted to experience.

The valuations for the outcomes identified to the individuals were taken from HACT’S Social Value Calculator (version 4)⁸ that identifies a range of well-being valuations. However, the data

⁸ Community investment and homelessness values from the Social Value Bank, HACT and Simetrica (www.hact.org.uk / www.simetrica.co.uk). Source: www.socialvaluebank.org. License: Creative Commons

from the questionnaire results and provided a distance travelled on how much change had been experienced, therefore a proportion of the wellbeing valuations were used accordingly.

Much consideration was given as to what best well-being valuation reflected the changes identified by the stakeholders. Many explained how the programme had helped them to deal with anxieties and stresses in their lives and therefore consideration was given to use the well-being evaluation from HACT social value calculator -Relief from depression and anxiety (adult) was used which has a value of £36,766 per individual. Although many had reported a change in their stress and anxiety levels, it was considered that this high value would risk over-claiming. Another value considered was for 'feel in control of life' valued at £15,894. As many felt more empowered to make decisions, this could be seen as appropriate. However, as many of the changes were derived from changes in their confidence, both self-confidence but also confidence in their own abilities and needs, the valuation for High Confidence was used for segment B and C of £13,080 and for segment A the Improvements in Confidence (youth) was used as this segment many included 16-24 year olds and this is valued at £9,283. Following the principle of not over-claiming, we only took the amount of value that represents the amount of change. So, for segment A, for those with a positive change, there was a distance travelled of 51%, and therefore that percentage of the value was used in the value map, which gave a value of £4,734.

This value is our anchor value, and from here the weighting of the outcomes was then used, so for segment A for 'Feeling empowered to make decisions' there was a value of £4,734 with a

weighting of 7, therefore for the other two outcomes, the same value was used but only taking the weighting as soon in the table above.

The state

Any changes to other stakeholders was not considered in this analysis as the focus of this report is to support EBTC to understand the impact for its main client group and to support them to better manage their impact. However, consideration can be given to other changes to services. One of the biggest referrers to the Empowerment programme is Remploy, to support individuals who are unemployed to feel more empowered and support their resilience. 40% of those who accessed the programme between April 2018 and April 2019 have gone into employment and therefore consideration can be given to included changes in income, but also potential savings for Department of Work and Pensions.

Table 6 – Examples of Outcome Valuations

Outcome	Weighting	Identified value	Value of average distance travelled	Quantity of stakeholders experiencing outcome
Segment A – in education. Outcome of ‘feeling empowered to make decisions’	7	Used HACT well-being valuation, Improvement in confidence (youth) valued at £9,283 for unknown area. Took 51% of this value based on the distance travelled, therefore £4,734 per individual.	Taking the lowest point for our questionnaire scale – asking individuals to rate against measures (not applicable / no change =0%, little change = 25%, some change = 50%, quite a lot of change = 75%, a lot of change = 100%). The average movement was equals 51%. Although based on a sample size the results were in line with the tone of interview comments – this was cited as an extremely significant change.	From the data in second review, 60% had experienced change here, so 21 individuals.
Segment B – Employed. Outcome of improved mental health	8.5	Used HACT well-being valuation, High confidence valued at £13,080 for unknown area was used for the anchor value of ‘feeling empowered to make decisions. Took 57.5% of this value based on the distance travelled, therefore £7,456 per individual. However, as this was valued at 8.5 lower than the value of ‘feeling empowered’ at 9.5 and therefore 85% of the value was used.	Taking the lowest point for our questionnaire scale – asking individuals to rate against measures (not applicable / no change =0%, little change = 25%, some change = 50%, quite a lot of change = 75%, a lot of change = 100%). The average movement was equals 57.5%. Although based on a sample size the results were in line with the tone of interview comments – this was cited as an extremely significant change.	From the data in second review, 60% had experienced change here, so 8 individuals.

7.0 Establishing Impact

In order to assess the overall value of the Empowerment programme outcomes we need to establish how much is specifically a result of the project. SROI applies accepted accounting principles to discount the value accordingly, by asking;

- What would have happened anyway (deadweight)?
- What is the contribution of others (attribution)?
- Have the activities displaced value from elsewhere (displacement)?
- If an outcome is projected to last more than 1 year, what is the rate at which value created by a project reduces over future years (drop-off)?

Applying these four measures creates an understanding of the total net value of the outcomes and helps to abide by the principle not to over-claim.

Deadweight

Deadweight allows us to consider what would happen if the service wasn't available. There is always a possibility that the individuals would have received the same outcomes through another activity or by having support elsewhere.

All stakeholders were asked during the stakeholder engagement process and in the quantitative data collection to consider what could have happened anyway. Many commented in the interviews about how they had struggled for years with low confidence and anxiety levels, and that the changes they experienced was all down to the programme and the support,

“My self-confidence has overall improved despite my fall-backs particularly during stressful and intense situations.”

In the questionnaire results both those who were employed and unemployed gave a similar deadweight result of 30%. Consideration was also given as to what other support was available to achieve the same results.

For all stakeholders, it is possible that they could have accessed another programme that would offer similar results or attended other activities that could help them to identify changes.

However, many commented on how unique the programme was, and in many cases helped them to deal with long term problems.

To have a consistent approach, the different levels of deadweight and attribution will be considered using the rates below;

Low = 30%

Medium = 60%

High = 90%

Through the interviews with individuals and other stakeholders, and the results of the questionnaires, a reasonable estimate is given in Table 7 below.

Table 7 – Deadweight

Stakeholder	Outcome	Deadweight	Justification
Individuals on the Empowerment Programme who are in education	All well-defined outcomes	60%	As the individuals were either in school, college or University, it is possible that some of these changes could have happened anyway. However, some of the providers themselves explained the big difference they've seen in both results and in how the individuals were engaging more effectively. Therefore, a medium deadweight rate is used. It is more likely for this stakeholder group than the others of achieving these changes.

Individuals on Empowerment Programme who are employed	All well-defined outcomes	30%	Many of the stakeholders explained how they were struggling in employment with stress and anxiety, either because of a lack of support or lack of confidence in themselves. The individuals explained how the programme had helped them to realise their value and the skills they were contributing. However, it is still possible that some of the outcomes could have happened over time, therefore a low deadweight rate is used.
Individuals on the Empowerment programme who are unemployed	All well-defined outcomes	30%	The majority of the individuals were unemployed and had low confidence levels and didn't feel empowered at all. Although some support was given from other programmes or charities, many commented on how the programme had empowered them to go in to training or find new employment. A low rate is given to this stakeholder segment.

Attribution

Attribution allows us to recognise the contribution of others towards achieving these outcomes.

There is always a possibility that others will contribute towards any changes in people's lives, such as family members or other organisations. Attribution allows us to see how much of the change happens because of the support by this project.

Considering the results of the survey, a medium rate of attribution was given by all stakeholders. However, in line with the qualitative work and engaging with other referrals, a lower rate of 30% is given to all three segments for the outcome of 'feeling empowered to make decisions. After much research, no other programme in the area offers the same focus on empowering individuals to make changes along with mentoring. There are other third sector support that might support individuals with dealing with anxieties and stress, but the combination of gaining a qualification as well as facing some of their characteristics that might be holding them back, allowed them the tools to develop their empowerment to make changes.

For those who are unemployed, they are more isolated and likely to have low confidence and not feel valued, and therefore any changes are given a lower attribution rate as many said how much the programme had inspired them to make changes.

This is also true for those in education, however, many commented on how the course had empowered them to make changes,

“I feel quite proud”.

Displacement

We need to consider if the outcomes displace other outcomes elsewhere. For example, if we deal with criminal activity in one street, have we just moved the problem elsewhere? This programme is an innovative and therefore does not displace anything.

Duration & Drop-off

As this programme is evaluated as part of the Social Value Cymru project, the evaluation considered 12 months of value only, and therefore no drop-off rate is needed. Many of the clients engaged with, had been on the programme month previously and gave confidence that some of the changes lasted for at least several months after the programme. The programme itself is only a few sessions with some follow up support from Empower- Be the Change. The organisation will contact clients some months after the programme to monitor any changes, but no contact will be made after 12 months, and therefore it is recommended that only 12 months of value should be considered to avoid over-claiming.

SROI Results

This section of the report presents the overall results of the SROI analysis of the Empowerment Programme provided by EBTC. Underpinning these results are the seven SROI principles which have carefully been applied to each area of this analysis. The results demonstrate the positive contribution that the Empowerment Programme makes through the dedication of staff to create a positive change in the lives of those who need inspiration to be empowered to make important decisions in their own lives.

By supporting individuals to increase their confidence and build their mental resilience, the programme provides them with the ability to make decisions, and to be better able to cope with different situations that life might throw at them, whether that is in employment or in their own personal lives.

The results in Table 8 indicate a positive return for individuals who completed the Empowerment Programme and experienced positive outcomes. This is based on current data but also secondary research.

Table 7 - Present Value Created per Individual Involved

Stakeholder	Average value for each individual involved
Individuals	£2,731

The overall results in Table 8 highlight the total value created, the total present value, the net present value, and ultimately the SROI ratio.

Table 8 – SROI Headline Results

Total value created	£
Total present value	£362,625
Investment value	£92,167
Net present value (present value minus investment)	£270,458
Social Return on Investment	<u>£3.93:1</u>

The result of £3.93:1 indicates that for each £1 of value invested in Empowerment Programme, a total of £3.93 of value is created.

8.0 Sensitivity Analysis

The results demonstrate highly significant value created by the Empowerment Programme and is based on application of the principles of the SROI framework. Although there are inherent assumptions within this analysis, consistent application of the principle not to over-claim leads to the potential under-valuing of some material outcomes based on issues such as duration of impact.

Conducting sensitivity analysis is designed to assess any assumptions that were included in the analysis. Testing one variable at a time such as quantity, duration, deadweight or drop-off allows for any issues that have a significant impact on the result to be identified. If any issue is deemed to have a material impact, this assumption should be both carefully considered and managed going forward. To test the assumptions within this analysis, a range of issues were altered substantially to appreciate their impact. A summary of the results is presented in table 9.

Although some of the sensitivity tests indicate changes to the result, owing to the scale of the amendments made and the verification of assumptions and data with stakeholders, the results still indicate that if a single variable were significantly altered, the overall results remain highly positive. The most significant impact of the sensitivity analysis is based on the change to the outcome for segment C. This could be because of the relatively high value given to this outcome. Again, the sensitivity test uses a relatively large change, and although there is a great deal of confidence in the figure employed, it nevertheless indicates the importance for Empower- Be the Change to carefully manage this issue in the future.

As seen in section 8, different steps were taken to support the assumptions for the deadweight and attribution percentages. If all of the stakeholder segments were to have a 60% deadweight and attribution percentage, the results still demonstrated a positive result of £1.54 for every £1

invested. From the sensitivity analysis table on the following page, the social value evaluation can be estimated to be between £1.54 and up to £4.71 for every £1 invested. The assumptions used in the value map estimate the social value is £3.93.

Table 9 – Sensitivity Analysis Summary

Variable	Current assumption	Revised assumption	Revised SROI	Proportion of change
Segment A – Empowerment programme for those in education Outcome – improved mental health	Quantity: 21	Quantity: 10	3.83	2.5%
	Deadweight: 60%	Deadweight:90%	3.79	3.5%
	Attribution: 60%	Attribution: 90%	3.79	3.5%
	Value: £5,410	Value: £2,500	3.83	2.6%
Segment B – Empowerment programme for those employed Outcomes – Increased satisfaction	Quantity: 8	Quantity: 20	4.18	6%
	Deadweight: 30%	Deadweight: 60%	3.86	1.7%
	Value: £7,035	Value: £3,500	3.85	2%
Segment C – Empowerment Programme for those who are unemployed Outcome – More empowered to make decisions	Quantity: 29	Quantity: 15	3.38	13.9%
	Attribution: 30%	Attribution: 90%	2.95	24.9%

9.0 Conclusion

This report has demonstrated that the Empowerment Programme has created over £360,000 of value and for each £1 invested, £3.93 of value is created;

What that means in practical terms is that people's lives have been positively changed.

The Empowerment Programme supports individuals to build their mental resilience and their confidence to ensure that they feel more empowered to make decisions in life, both their personal life but also within their working environment or training environment. Many of the individuals were surprised with their Mental Toughness Questionnaire Results and through the programme and the mentor support, the bespoke and personalised support service allowed the individuals to see positive changes in their lives.

Key finding includes;

- For every £1 invested there £3.93 of social value created
- For those who took part in the data collection process, 59% of those who were unemployed felt more empowered to make decisions and also 53% felt their mental health had improved.
- For those in education, who were mainly 16-24-year-old, 51% felt more empowered to make decisions
- The empowerment programme supported individuals to improve their confidence and empowerment to realise they are the key to their own success.
- The findings are aligned with that needed for a 'Healthier Wales' in the Well-being of Future Generations (Wales) Act, "A society in which people's physical and mental well-

being is maximized and in which choices and behaviors that benefit future health are understood.”

- The Empowerment Programme support individuals to have access to employment, training or ensure they maintain in employment.

10.0 Recommendations

- 1) **Data collection** – in order to realise how much change and impact the programme is having on all stakeholders we need data to understand if there is any change, but also how much change, and whether there are differences in the needs of different individuals. It is therefore recommended that any continuation of this scheme, needs to **invest the time and finances into ensuring suitable systems and processes are in place to measure social value**, and also to extend this to include other important stakeholders. When such data is collected over a period of time, the potential to use the resultant information to inform decision making is possible. Ultimately, this means that value is not just being measured, but it is being managed to improve the impacts of the project. Empower – Be the Change are part of the north Wales Social Value Cymru project, and therefore will be moving on to having their own impact management system and putting these changes in place.
- 2) The most important impact is that created for the individuals we support. However, the data collection could progress to further understand how many people enter employment and for how long they maintain in employment.

11.0 Appendices

