



SOCIAL RETURN ON INVESTMENT (SROI) EVALUATION REPORT OF ERLAS VICTORIAN WALLED GARDEN IN WREXHAM

Part of the Social Value Cymru project

“I believe Erlas Walled Garden is an excellent place for all types of people to enjoy and benefit from. Every community should have something similar.”

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Executive Summary

Erlas Victorian Walled Garden offers support for adults with physical and learning disabilities by providing meaningful daytime activities which allows them to develop their full potential while also supporting their mental and physical well-being. All the service users who took part in the analysis had been attending the garden for some time and felt that the garden had created positive changes in their lives, and this was also evidenced by the feedback from family members and carers.

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

The result of £4.24:1 indicates that for each £1 of value invested, £4.24 of value is created.

The legislative framework in Wales provides a great focus on services responding to the needs of individuals and planning service around what matters for the service users. Staff and volunteers ensured the service was planned according to the need of the individual which helped service users to feel reassured and part of the organisation. Outcomes experienced by service users included **improved mental health, reduced isolation and a better sense of achievement as they are able to reach full potential.** Volunteers had also benefited from the service with their own mental well-being and feeling part of a community.

Acknowledgements

This report would not be possible without involving key stakeholders to understand what changes have taken place and establish their impact. Some of the service users joined us for a conversation in the garden and it was a pleasure to hear of their experiences. A huge thank you to the volunteers and staff who facilitated this session.

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

Diolch yn fawr / Thank you

1.0 Introduction

This evaluation report will analyse the value of the Erlas Victorian Walled Garden in Wrexham who provide meaningful daytime activities for adults with learning disabilities and mental health issues. 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)

Erlas Victorian Walled Garden is a charity and Company Limited by Guarantee based in Wrexham and aims to promote and protect the health of people with disabilities by providing meaningful daytime activity, education and work experience in a garden business environment, allowing individuals to develop their mental and physical capabilities, thus improving their quality of life. Through providing activities that support the education and enjoyment of the outdoors, they also promote the conservation, protection and improvement of the physical and natural environment.

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 – the service users and volunteers who attend the garden. These results will then be used as a baseline for the board to embed social impact measurement to inform their decision making.

Erlas Victorian Walled Garden provides opportunities for adults with learning disabilities and mental health issues to take part in meaningful daytime activities which involves gardening, art and crafts and basic skills. Service users will have an agreed package of care and will be able to attend for a minimum of half a day or a maximum of 5 days a week, depending on their needs. Some service users will pay to attend for additional sessions within the garden.

Through the risk assessments and care plans they develop an understanding of what people 'can do', and will provide them with goals to encourage them to reach full potential. Those goals aren't always about abilities in the garden, although they can

be about increasing fitness and stamina; they can be social, around working within a group, about improving their basic skills through inclusion in classes; they will also encourage a healthy diet. For some there will be targets around social interaction and getting them more confident to communicate and take part in group activities.

There are art & crafts classes on a Monday and Friday mornings; basic skills on Wednesday mornings; sewing on a Tuesday afternoon, and for a few months over the winter there will be an extra basic skills class on a Tuesday morning which is more project-based, with a "Victorians" theme.

Carers and volunteers work with support workers and gardeners to ensure service users are supported. Activities will also vary for the volunteers based on their needs and skills.

Identifying the need

In the north Wales Population Needs Assessment in 2017¹, it is estimated that the number of adults with learning disabilities needing support to increase 2% every year until 2020 before it will stabilise. In 2014-15 there were 470 adults with learning disabilities on the register in Wrexham. The Social Service and Well-being (Wales) Act 2014 places a duty on Local Authorities to plan services around 'What Matters' to the individual, allowing services to be developed and planned around their needs and their preferences.

It is identified in the Population Needs Assessment that adults with learning difficulties will experience more health complications and require more health and social care support.

Some of the needs identified were²;

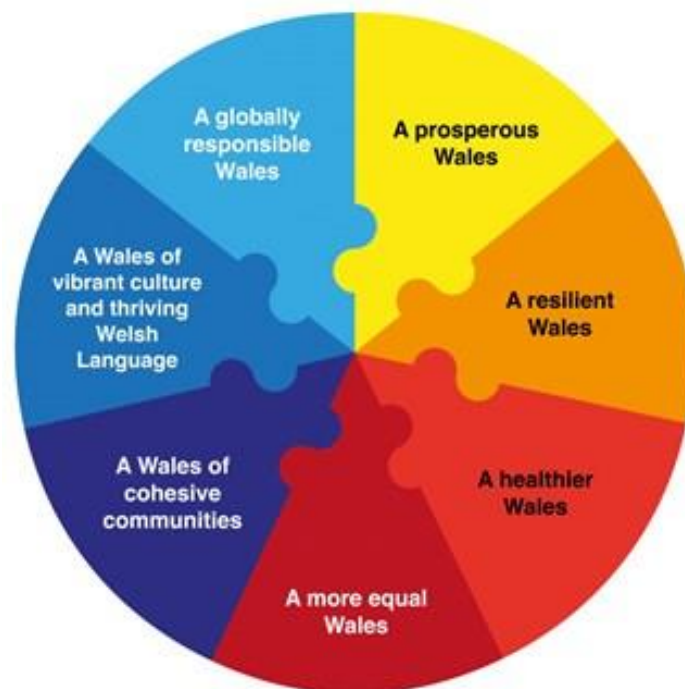
- A person with a learning disability is between 50 and 58 times more likely to die before the age of 50 and four times more likely to die from causes that could have been prevented compared to people in the general population.
- People with learning disabilities tend to be less physically active and are more likely to be overweight and obese than the general population (Liverpool Public Health Observatory, 2013).
- Between 40-60% of people with a learning disability experience poor mental health without a diagnosis.
- People with learning disabilities have increased rates of gastrointestinal and cervical cancers.
- Around 80% of people with Down's syndrome have poor oral health.

¹ <https://www.northwalescollaborative.wales/wp-content/uploads/2017/05/NW-Population-Assessment-Full-Report-1-April-2017.pdf> accessed 08/01/2020

² <https://www.northwalescollaborative.wales/wp-content/uploads/2017/05/NW-Population-Assessment-Full-Report-1-April-2017.pdf> accessed 08/01/2020 page 165. Accessed 08/01/2020

It was identified that communication was a barrier for many adults with learning disabilities which could result in health complications, and therefore having a support network that can help them with this could have a positive impact on these results.

Acknowledging that there are many factors that affect a person's quality of life, the Welsh Government enacted the Well-being of Future Generations (Wales) Act 2015 which aims to improve the social, economic, environmental and cultural well-being of Wales, through improving the well-being of individuals. There are 7 Well-being Goals in the Act.



The work of ErLas contributes to 'a healthier Wales', the goal of which is to be "A society in which people's physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood" (Essentials, p6). Supporting adults with learning disabilities to develop to their full potential can have a positive impact on their health and well-being now and in later life.

The Act also outlines 5 Ways of Working for public bodies to meet the Sustainable Development Principle, which exists “to ensure that the needs of the present are met without compromising the ability of future generations to meet their own needs” (Essentials, p7). Three of the Ways of Working are:

- Prevention: how acting to prevent problems occurring or getting worse may help public bodies meet their objectives
- Long term: the importance of balancing short-term needs with the need to safeguard the ability to also meet long-term needs
- Integration: considering how the public body’s well-being objectives may impact upon each of the well-being goals, on their own objectives, or on the objectives of other public bodies

The Population Needs assessment is prepared in response to the Social Services and Well-being (Wales) Act 2014 and supports the Well-being Assessment as part of the Well-being of Future Generations Act (Wales) 2015. The fundamental principles of the Act are:

Voice and control – putting the individual and their needs at the centre of their care, and giving them a voice in, and control overreaching the outcomes that help them achieve well-being;

Prevention and early intervention – increasing preventative services within the community to minimise the escalation of critical need;

Well-being – supporting people to achieve their own well-being and measuring the success of care and support;

Co-production – encouraging individuals to become more involved in the design and delivery of services;

Multi-agency – strong partnership working between all agencies and organisations.

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.

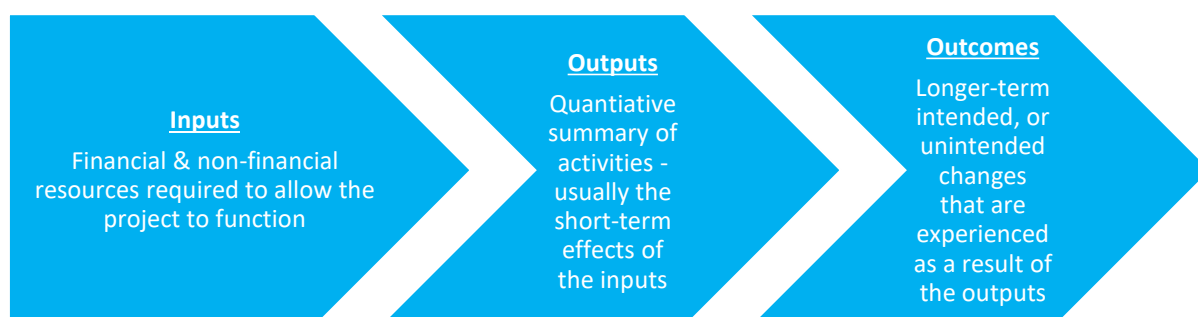
Social Return on Investment Principles

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)

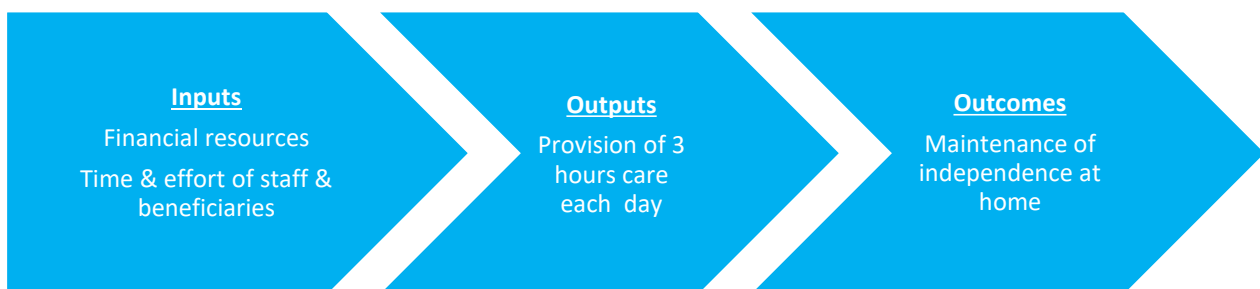
The guiding principles ensure that *how* value is accounted for remains paramount. To ensure a consistent approach is used, chains of change are constructed for each material stakeholder explaining the cause and effect relationships that ultimately create measurable outcomes. These chains of change create 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 Erlas Victorian Walled Garden, 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
Service Users	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 and carers	No	Family members are likely to experience some positive impact and changes experienced will be both relevant and significant. They will not be included in this analysis as it is beyond our scope.
Erlas Victorian Walled Garden	Yes	Provides material inputs of finance, skills and other resources to ensure the strategic direction of the project, so must therefore be included.
Volunteers	Yes	Volunteers are key beneficiaries and their changes will be relevant and significant.
Local authority	No	The Local Authority funds the activities. If no such opportunities were available elsewhere it could have a big impact on how much support they would need elsewhere, and the changes are likely to be relevant and significant, however, this was beyond the scope of this analysis.
NHS	No	Many experienced positive changes in their mental health. The potential impact on health will be considered but is unlikely to be significant.

Referral agents	No	Many organisations refer people to volunteer at the garden. However their changes is not likely to be significant.
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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 Funding Officer and with the nominated Social Value Champion on the Board of Trustees 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 facilitated by one of the volunteers to ensure the stakeholders were at ease and to ensure the right expertise was there to manage the conversation. 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

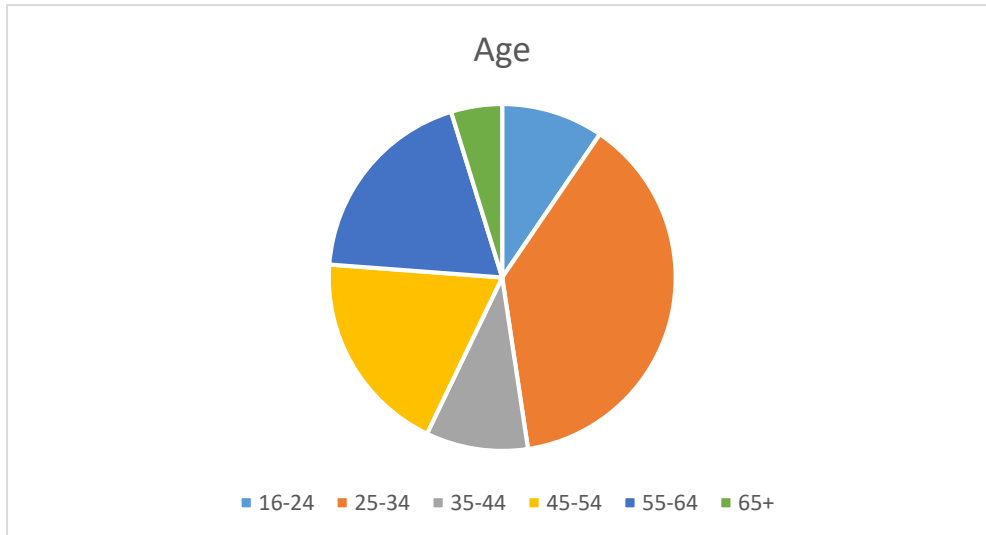
if they had any negative experiences allowed them to tell their story from their own perspective. It was essential for us to use the expertise of the Erlas volunteers here. The focus groups lasted approx. 40 minutes with the face to face one: one interview lasting approx. 30. Minutes. The participants were extremely open and were 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 made. 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 for the service users, which are age and gender. The diagrams below demonstrate the groups represented in this project.

Age



Gender

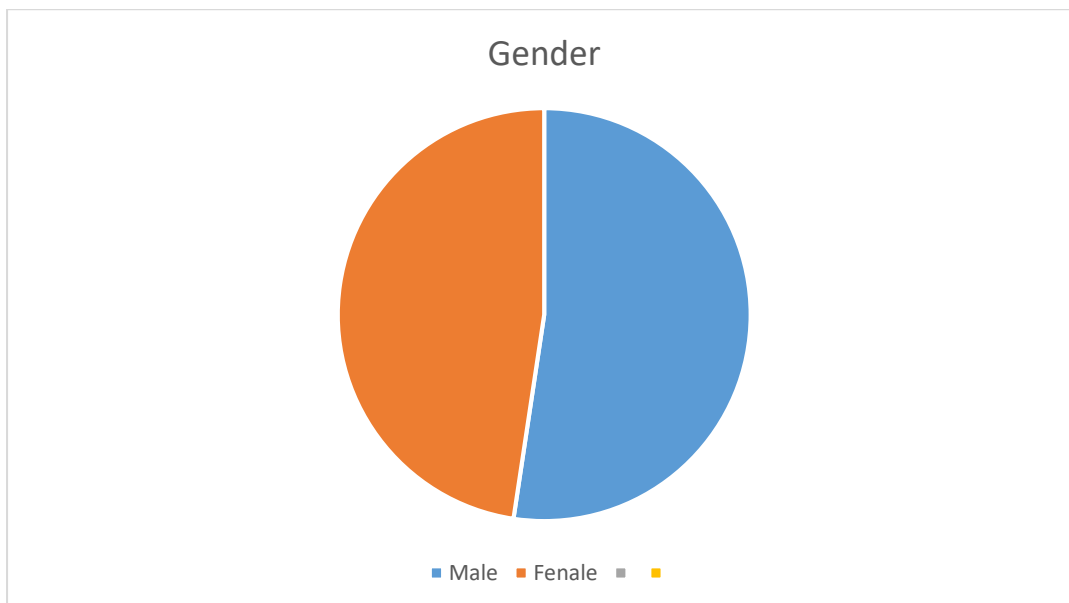


Table 2 provides a summary of the stakeholder engagement process. 100% of service users completed a survey with some support and 3 took part in the qualitative stages. 8 family members or support workers also completed surveys to enhance the understanding of any

changes for the service users. Two volunteers took part in the interviews, and 48% completed surveys.

Table 2 – Stakeholder Engagement

Stakeholder	Population size	Method of engagement
Service Users	21	1 x focus group at the garden with 3 service users 13/11/2018 100% of individuals completed the survey 8 carers or family members also completed a questionnaire to confirm some of the changes
Regular volunteers	48	1 x interview with two volunteers 48% of volunteers completed a questionnaire
Erlas Victorian Walled Garden	1	Several meetings with the staff and trustees

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.

Service Users

This service is funded mainly through the Local Authority, and the amount of days they can attend will depend on their individual needs' assessment by the local authority. The maximum days they can attend is five days. The minimum anyone would attend is half a day and on average service users will attend two days a week. Some families will also pay privately for sessions or additional sessions which will vary but could be around £40 a week.

In addition to financial contributions, the service users will need to put their trust in the organisation, the staff and volunteers. Over time, friendships are established, and the service users will feel more able to reach out to the staff. The aim is to give them opportunities to help them reach full potential, and this might involve trying different things, which might initially cause some anxiety and therefore trust again is essential.

They also contribute their skills to ensure the garden and centre is sustainable. Many of the service users are keen gardeners, with one in particular who took part in the focus group was a very skilled gardener with much knowledge about the plants. Others had skills with craft, others with sales, and therefore they all contribute towards Erlas as a working garden.

Volunteers

Volunteers are very important to the garden and their contribution towards the garden and supporting service users is essential. Volunteers will give their time and their willingness to ensure the garden is a success. They also bring their skills and expertise.

It is appropriate to add the financial contribution for the volunteer's time. During 2018-2019, there was 7,482 hours of volunteering. The national living wage £8.21³ will be used to calculate the contribution for this time,

$$7,482 \text{ hours} * \text{£}8.21 = \text{£}61,427$$

Erlas Victorian Walled Garden

The financial input is managed by Erlas and the inputs for the 12 months to run the centre is £108,000. The majority of this income is through Service Level Agreements with the local authority but also some private funding, self-generated income through Open Day sales, sales of fruit and vegetables and other small grants.

This income pays for the salary of staff members, including administrative support, management and resources. It also pays for the overheads of running the garden, volunteer costs and any resources needed for activities and training.

The skills of the staff were 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. Through observation it was apparent that the staff and volunteers were highly skilled at tailoring services and support in a way that allowed individuals to develop and reach full potential.

³ <https://www.gov.uk/national-minimum-wage-rates> accessed 07/01/2020

Total monetised inputs

The total inputs for the project over the one-year period have been calculated as £186,427 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.

Table 3 – Total Monetised Inputs for Erlas Victorian Walled Garden

Stakeholder	Financial input	Non-financial input	Cost per individual
Service Users	Contributions are made but is included below to be managed by Erlas	Willingness to take part in activities and trust the staff and volunteers.	N/A
Erlas	£108,000	Strategic management, time, expertise	£5,142
Volunteers	£61,427	Time, skills, willingness to work as a team.	£1,279
Totals	£169,427		

5.0 Outputs, Outcomes & Evidence

The immediate outputs for ErLas, is the number of service users attending the garden and how many hours of support each person received from the service. From 4th April 2018 until 5th April 2019 there were 21 service users attending the programme. In addition, there are 48 regular volunteers at the garden, as well as another 140 volunteers who attended through various groups such as DWP, Community Mental Health Team and local colleges. On average, volunteers have done over 40 hours each during the 12 months, however, the regular volunteers will volunteer much more than this and some of the groups would only be there for a few hours.

Table 4 below summarises all the stakeholders, their outcomes and considers their materiality, that is are they relevant and significant. 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 service user and volunteer's 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
Service users	Access to a variety of activities at Erilas	Excluded	This was relevant to most stakeholders; however, this is an intermediate outcome that leads to the well-defined outcomes	
	Feeling better as they feel part of the community	Excluded	This was relevant to most stakeholders; however, this is an intermediate outcome that leads to the well-defined outcomes	
	Having a voice – increased confidence to voice concerns	Excluded	This was relevant to most stakeholders; however, this is an intermediate outcome that leads to the well-defined outcomes.	
	Sense of belonging and feeling part of something	Excluded	This was relevant to most stakeholders; however, this is an intermediate outcome that leads to the well-defined outcomes	
	Feeling safe	Excluded	This was relevant for many stakeholders; however, this is an intermediate outcome that leads to the well-defined outcomes	

Sense of purpose – being able to take on some responsibilities (applicable to some)	Excluded	This was relevant to those service users who have a special job; however, this is an intermediate outcome that leads to the well-defined outcomes	
Improved opportunities for social interaction and friendships being developed	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.	
Sense of achievement as they are able to reach full potential	Included	This was relevant to the stakeholders who do have additional roles and responsibilities during the qualitative stages, and the quantitative data demonstrated a lot of change	Qualitative: Service users progressing by being able to have roles such as gardeners, sales or crafts. Quantitative: Questionnaire 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 feeling happier since they have been coming to ErLas. Some spoke about being in other places before that made them unhappy. Quantitative: Questionnaire results

	Reduced isolation	Included	This was relevant to all stakeholders during the qualitative stages, and the quantitative data demonstrated a lot of change	Qualitative: They spoke about new friendships and how isolated they would be without the support Quantitative: Questionnaire results
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Material Outcomes for each stakeholder

Many of the service users had been attending the garden for many years. As this was the first evaluation, we needed service users to think back about the amount of change that they'd identified during that time. Any future analysis could consider how those changes are maintained. When measuring value, it is not always looking at the amount of positive change but avoiding possible deterioration also.

5.1 Service users

Outcome 1 – Reduced isolation

During the qualitative stakeholder engagement, many of the clients explained how they had developed friendships at Erlas. One service user explained how alone she felt after losing her parents and felt that she now feels part of a community within the garden.

The average amount of change in the client questionnaires was 68%, and 56% of family members said they'd seen quite a lot or a lot of change when asked if they feel less isolated.

"I like to help out in anything.
I like to do my plant shop and all sorts of other engagements.
I like the atmosphere and when the sun shines on the project.
I like the people. They are friendly.
It gives me a reason to live." *Service user*

"There is a welcoming and inclusive atmosphere in Erlas which is at the centre of all they do."

Family member

This outcome is also relevant to the volunteers. Some of the volunteers are supported by the garden staff members and this ensures that they are able to volunteer on a regular basis as without any support this would be difficult.

People's motivation for volunteering at the centre varied. Some have family members who have a learning disability and therefore they want to be able to support the charity. Others had retired and wanted to volunteer in the outdoors, and other enjoyed the quietness and the therapeutic element that gardening, and the natural environment can offer.

"It is very rewarding to work / help those users with a variety of disabilities. It is a very sociable and friendly place to be. I have always felt most welcomed and part of the team." *Volunteer.*

39% of volunteers said they had seen a positive change in reducing their isolation. For many, this might not have been identified as an issue before. Further understanding of characteristics in future analysis can help us to identify further insights here as to how valuable this change is for those that perhaps didn't have a support network previously.

Outcome 2 – Improved mental health

The service users spoke a lot about how happy they are when they visit the garden, and on observation there is a close family unit atmosphere at the garden.

"I love the garden so much.
Nice people to work with. I've got friends.
I like the sewing class with S." *Service user*

In discussing other opportunities for the service users if the garden wasn't here, some spoke about other opportunities or places they had been in the past which didn't offer the opportunity to be outdoors, or that offered the same variety of opportunities. Being in an environment which is very repetitive or doing an activity that they don't enjoy had in the past had a negative impact

on some of the service user's mental well-being. Much of the family's had also commented on the positive changes they had seen.

"Gardening is a passion of X and helps her well-being as it puts negative thoughts to the back of her mind." *Family member*

The average amount of change in the client questionnaires was 69% when asked about **an** changes in their mental health.

This outcome was also true for many of the volunteers. Many commented on how they had experienced some positive changes in their confidence, sense of purpose and how it contributed towards improving their own mental well-being.

"Priceless, beyond valuable!"

"I lost my confidence after a breakdown a long time ago. Coming to EVWG has restored my confidence." *Volunteer*

"I think it's paradise as we all have a laugh." *Volunteer*

"It's a beautiful and peaceful place to be. It is great for my personal well-being just being in the garden." *Volunteer.*

Outcome 3 – Sense of achievement as they are able to reach full potential

The garden offers service users a variety of activities, and they give people the opportunity to reach their full potential, whether that is getting them more able to use digital platforms, take part in an activity, or to be responsible for some of the work such as the gardening, selling plants, working in the shop or anything else. The staff spoke about having a 'special job' which increased confidence and independence for some of the service users.

“I like to help out in anything.

I like to do my plant shop and all sorts of other engagements.” *Service user*

The staff and support workers commented on seeing a big change in the confidence of some of the individuals, and especially confidence to communicate more openly about their needs and to say if anything was concerning them.

“She has always been ‘working’ in catering and decided she didn’t want to do it anymore. She came to ErLas 3 years ago and really enjoys coming here, complete change to what she did before.” *Support worker*

“It’s important for people at risk to have meaningful employment and the opportunity to achieve their full potential in a safe environment with staff who are retrained to deal with their needs.”

Family member

75% of service users said they felt a big change with this outcome since being at the garden and 75% of family members or carers also felt there was quite a lot or a lot of change with the outcome of having opportunities to reach their full potential.

What could be better?

Stakeholders were given the opportunity to say about any negative changes or if they felt anything could be better. Although the feedback was all highly positive, the organisation recognises that there is always room for improvements and how important it is to listen and be responsive when possible to the voice of the stakeholder. Some of the key points were:

Catering opportunities – some felt they would like to see more opportunities to cook and make something out of the produce they have. They did discuss a plan to have a kitchen which could again give them more of a variety of activities, especially in bad weather.

Sales – The garden does have open days and also a Christmas market. Some wanted to expand on this and have more of an opportunity to sell.

Marketing – externally, better contacts with potential partners. Some felt there could be better communication, for example through newsletters.

Some wanted a bit more of a process, asking for weekly reports on progress and perhaps a plan for priorities and tasks for the week ahead. One of the family members also commented that they would benefit from having a timetable as their loved one likes to have a routine.

Another point made was that they'd like to see more projects alongside the local schools to get more integration work.

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 service users and volunteers at Erlas Victorian Walled Garden.

Impacts of Erlas Victorian Walled Garden

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 garden. 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.

Service users

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. In the quantitative data, individuals were asked to confirm their importance of any changes in the survey by saying out of 10 how important each outcome was to them. 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
Service Users	Reduced isolation	9
	Improved mental health	9
	Sense of achievement as they are able to reach full potential	10
Volunteers	Reduced isolation	8
	Improved mental health	7.5

All the outcomes for the service users was seen as being very important, with Sense of Achievement being the most important. However, the reduced isolation and improved mental health was also highly important both with a weighting of 9/10. For many who had limited activities offered to them previously, or who were involved in activities that was of low interest, they were eager to demonstrate how much value they placed on coming to Erlas.

The volunteers on average scored both material outcomes very similar. The reason for volunteering at Erlas was very different, some came as they needed support themselves, others wanted to develop skills or use existing skills, and some wanted to feel positive that they are contributing to society. As a development point for this report it would be good to look further at these characteristics in the future to see if there are differences in how important the different changes are.

The valuations for the outcomes identified to the individuals were taken from HACT'S Social Value Calculator (version 4)⁴ that identifies a range of well-being valuations. However, the data from the questionnaire results 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 Erlas 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. Following the principle of not over-claiming, we only took the amount of value that represents the amount of change. So, for the service

⁴ 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 Attribution-NonCommercial-NoDerivatives license(http://creativecommons.org/licenses/by-nc-nd/4.0/deed.en_GB)

users for those with a positive change, there was a distance travelled of 69%, and therefore that percentage of the value was used in the value map, which gave a value of £25,369.

This value is our anchor value, and from here the weighting of the outcomes was then used to get the other monetary values.

For the volunteers the well-being valuation was also taken from HACT's Social Value Calculator. Here the value for Regular volunteering was used which has a value of £3,249 which represents someone who volunteers at least once per month. As many had reported a change in their isolation and mental health, it was considered that we used another value such as the Reduced Stress and Anxiety with a value of £36,766 or the value for change in confidence which has a value of £13,080. However, to avoid over-claiming this well-being outcome was used and also only the percentage of change was taken from the value also to ensure consistency, which gave a value of £1,463 for Improved Mental Health.

The state

Any changes to other stakeholders was not considered in this analysis as the focus of this report is to support Erlas Victorian Walled Garden 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.

The Local Authority funding to Erlas is given through Service Level Agreements for every service user. Service Level Agreements are designed based on each individuals' requirements. It could be said therefore, that if the individuals did not attend Erlas, the Local Authority would still contribute SLA costs towards other activities as it is based on the individual requirements.

However, it is possible to consider if there are any other cost reallocation that could be included if the service users did not attend Erlas. During the stakeholder engagement process with

service users, volunteers, staff and family members it was clear that for many, attending the garden had a positive change on many of the service users physical and mental well-being. It was also apparent that many of the volunteers had seen a positive change in their confidence and mental well-being. Further data collection would be needed to further understand any potential cost reallocation, but consideration could be given to potential cost reallocation for health and social care if they were not able to attend the garden.

Table 6 – Examples of Outcome Valuations

Outcome	Weighting	Identified value	Value of average distance travelled	Quantity of stakeholders experiencing outcome
Service Users - Improved mental health	9	Used HACT well-being valuation, Reduced Stress and Anxiety (adult) valued at £36,766 for unknown area. Took 69% of this value based on the distance travelled, therefore £25,236 per service user.	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 69%. Results is based on 1005 of service users being surveys the results were in line with the tone of interview comments – this was cited as an extremely significant change. This was also supported through the family surveys	From the data in second review, 100% had experienced change here, so 21 service users.
Volunteers – Reduced isolation	8	Used HACT well-being valuation for Regular Volunteering valued at £3,249 for unknown area was used for the anchor value of ‘improved mental health’. Took 45% of this value based on the distance travelled, therefore £1,462 per volunteer. However, as this was valued at 8 higher than the value of ‘improved mental health’ at 7.5 the value of £1,559 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 45%. 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, 56% had experienced change here, so 27 volunteers.

7.0 Establishing Impact

In order to assess the overall value of the Erlas Victorian Walled Garden 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 to consider what could have happened anyway. Many commented about how different Erlas was compared to perhaps other activities they had been involved with in the past,

“She came to Erlas 3 years ago and really enjoys coming here, complete change to what she did before. I hope it continues.” *Family member.*

“Volunteering in Erlas has given me the experience and confidence to apply for university. Without the encouragement of fellow volunteers and staff I feel this wouldn’t have happened.”

Volunteer.

In the questionnaire results for the service users, 50% said that any changes in their mental health would definitely not have happened without Erlas. Family members and support workers were also asked if they believe the changes would have happened without Erlas, and the majority gave a low to medium chance it could have happened anyway.

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 Garden was, how it was part of their family and support group.

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
Service users	All well-defined outcomes	30%	Many of the service users and family members felt the changes wouldn't have happened without the support of the volunteers and staff at the garden. However, consideration was given that for some they might experience similar changes if they had a service level agreement with another organisation. The majority of those in the stakeholder engagement explained how being outdoors was really important for them along with having a variety of activities available to their needs. Therefore, a low deadweight was used.
Volunteers	All well-defined outcomes	60%	On average, the volunteers that took part in the stakeholder engagement process said there was a deadweight of 52% for improved mental health and 49% for feeling less isolated. Many said that being able to volunteer in the outdoors and being part of the organisation offered them something that many other volunteering opportunities couldn't. To avoid over-claiming a medium rate of 60% is used.

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 a qualification a low rate is used. Many had some support through family or support workers, but many spent a lot of time at Erlas and the friendships there was recognised as being a big contributor towards the positive changes and maintaining those changes. Some also attended other activities in the community, some during the evening.

For the volunteers, a medium rate of 60% chance is used. Many felt that Erlas offered them a unique experience, but many of the volunteers were also supported through other projects. Some also had a support network with family and friends.

“I believe Erlas Walled Garden is an excellent place for all types of people to enjoy and benefit from. Every community should have something similar and I can see the physical and mental benefits for the people I support that attend weekly.” *Support Worker*

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 garden does not displace anything and therefore nothing will be included.

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 service users have been involved with the organisations for many years. Any changes would have been apparent when they first started attending the garden, therefore consideration was given more to maintaining those changes. To avoid over-claiming over 12 months of value will be considered.

SROI Results

This section of the report presents the overall results of the SROI analysis of ErLas Victorian Walled Garden. 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 ErLas makes to the lives of their service users and the volunteers.

By supporting individuals to reach their full potential by providing them opportunities to take part in a variety of activities, giving them support with basic skills and living skills, and allowing them when appropriate to have specific roles and responsibilities. For the volunteers, they are also able to use existing skills and develop new skills and by having a routine and support network it created positive changes in their mental well-being.

Table 7 demonstrates the value provided per individual on average. The value for the volunteers is only 3% of the total value created. The reason for this being that the anchor value for the volunteers was much lower having used the HACT well-being valuation for Regular volunteering compared to the high value of reducing stress and anxiety. For some of the volunteers, they had identified a lot of change as a result of being in ErLas. Segmenting the volunteers in the future would allow different well-being valuations to be applied to represent the changes.

The results in Table 8 indicate a positive return for service users and volunteers at ErLas. 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	£33,483
Volunteers	£312 (3%)

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	£718,173
Investment value	£169,427
Net present value (present value minus investment)	£548,746
Social Return on Investment	<u>£4.24:1</u>

The result of £4.24:1 indicates that for each £1 of value invested in Erlas Victorian Walled Garden, a total of £4.24 of value is created.

8.0 Sensitivity Analysis

The results demonstrate highly significant value created by Erlas Victorian Walled Garden 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.

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 £1.31 for every £1 invested. From the sensitivity analysis table on the following page, the social value evaluation can be estimated to be between £2.65 and up to £4.27 for every £1 invested. The assumptions used in the value map estimate the social value is £4.24.

Table 9 – Sensitivity Analysis Summary

Variable	Current assumption	Revised assumption	Revised SROI	Proportion of change
Service Users – Improved mental health	Quantity: 21	Quantity: 10	3.43	19%
	Deadweight: 30%	Deadweight:90%	2.92	31.1%
	Attribution: 30%	Attribution: 60%	3.58	15.5%
	Value: £25,369	Value: £12,000	3.43	19.2%
Service users – Sense of achievement as they are able to reach full potential	Quantity:15	Quantity: 8	3.67	13.5%
	Deadweight: 30%	Deadweight: 60%	3.71	12.5%
	Value: £28,187	Value: £14,000	3.62	14.5%
Volunteers – Reduced isolation	Quantity: 27	Quantity: 15	4.22	0.4%
	Attribution: 60%	Attribution: 30%	4.27	0.7%

9.0 Conclusion

This report has demonstrated that the Erlas Victorian Walled Garden has created over £548,000 of value and for each £1 invested, £4.24 of value is created;

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

The garden provides support for individuals with learning difficulty and mental health concerns to improve and maintain their mental well-being and ensure they are given an opportunity to develop and reach their full potential. The garden is a support network for the service users and volunteers and many friendships are developed. The skills of the staff and volunteers to identify 'what matters' for each individual ensures that individuals are central to their planning and decision-making process.

Key finding includes;

- For every £1 invested there £4.24 of social value created
- For those who took part in the data collection process, the average amount of change in reduced isolation for service users was 68%. The average amount of change in improved mental health was 69% and finally, the average amount of change in sense of achievement was 75%. These figures were also supported by family members and support workers.
- Volunteers reported a positive change in their mental well-being and for many it had made them feel less isolated.
- 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.”

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. Erlas 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. It was identified by the staff that the paperwork was difficult for many and that a 3 point scale would be better for them. New paperwork can be developed to respond to this need to identify if the changes are maintained.
- 2) Much insights was had from the stakeholder engagement process. Further understanding of segments can be developed for the volunteers to identify the difference in results.

- 3) Some of the families felt that improvements can be made to communication, both internally in terms of activities offered weekly, but also externally in order to promote the good work of the garden.

11.0 Appendices



Theory of Change
– day activities



Possible negative outcomes when needing to deal with changes

Funding – some would like to attend more often but due to funding we can't agree.



Theory of Change
– volunteers

