



Awel Aman Tawe

Social Return On Investment Report

January 2023 – December 2025



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Executive Summary

This Social Return on Investment (SROI) report explores the difference that Awel Aman Tawe (AAT) made in people's lives between January 2023 and December 2025 through five key projects: Hwb y Gors, We Are Energy Warriors (school education programme), Taith Co-op (community transport), Energy Advice Service and Egni Co-op (rooftop solar). Together, these projects aim to support communities across South Wales by improving wellbeing, reducing isolation, tackling fuel poverty, providing low carbon energy, and delivering environmental education.

Using the SROI approach, which measures both the story and the financial value of the changes experienced by people, AAT is forecasted to generate over £7.1 million of social during the 2023 - 2025. For every £1 invested, AAT is projected to create around £1.69 of value. This shows that AAT's work delivers strong, meaningful benefits for individuals, communities, and organisations.

Key Social Value Identified Across AAT's Projects

Hwb y Gors (Participants & Volunteers)

Hwb y Gors brings people together through creative activities, workshops, social groups and community events. These opportunities help tackle loneliness, improve people's confidence, and create a sense of belonging. Activities include the Repair Café, Stitch Club, Gardening Club, ceramic tiling, mosaic workshops and other arts-based groups.

For volunteers, the impact is especially strong, they feel less isolated or lonely, as volunteering helps them connect with others. 95% feel proud of being able to help people in the community. 86% feel they now have a greater sense of purpose, especially retired volunteers who value having meaningful activities to look forward to.

For participants, who regularly attend workshops and activities: 72% report better mental wellbeing, often linked to reduced isolation, routine, and positive social contact. 83% say they have developed new skills, boosting their confidence and willingness to learn. 83% feel a stronger sense of belonging by spending time with like-minded people in an inclusive, creative space. However, there was one unintended negative outcome. 69% of participants felt frustrated about delays and limited communication during the refurbishment of Hwb y Gors. Now that the Hwb is open, there is strong potential for this frustration to reduce, creating even greater value in future years.

We Are Energy Warriors

This environmental education programme supports pupils and teachers across south Wales to learn about climate change, energy use and sustainability through creative, hands-on activities. Delivered with artists, scientists and the Energy Sparks data platform, the programme brings practical learning directly into schools.

Feedback from teachers and pupils was extremely positive: 100% of schools said pupils now have greater knowledge and awareness about climate change, energy waste and food waste. Pupils have developed a strong sense of ownership over their environmental work, which increases motivation and pride. Pupils also feel more empowered to make informed decisions about the environment. Additionally, 100% of teachers now feel more confident teaching environmental topics thanks to the support, resources and specialist knowledge provided.

Because many of these changes are likely to last well beyond the three-year period of this evaluation, the programme has long term potential for future impact.

Taith Co-op

Taith Co-op provides affordable electric vehicle transport for people who may struggle to travel independently, including older people, carers, people with disabilities and those living with long term health conditions. Clients often rely on Taith to access essential services, attend appointments and stay socially connected.

The results show a major positive impact: 96% feel they now have more freedom and independence, as they no longer need to rely on family or friends. 92% feel less lonely and isolated, as the service enables them to meet others and stay active in the community. 93% feel less stressed about transport costs because of Taith.

Energy Advice Service

The Energy Advice Service supports households facing energy and fuel poverty through one-to-one advice, home assessments and help with bills and energy efficiency. People valued the advisors' personal, practical and non-judgmental approach.

The service created meaningful change: 58% of clients now feel less stressed about their energy bills because of the support they received. 67% have more knowledge and awareness of how to make their homes energy efficient. 54% have changed their behaviour around energy use, such as switching from tumble dryers to line drying when possible.

Egni Co-op

Egni Co-op installs solar panels and other renewable technologies for schools, community buildings and businesses, with ongoing technical and maintenance support. 94% of organisations have saved money on their energy bills. 100% have gained greater awareness and understanding of renewable energy. 94% feel they now have greater capacity to manage their energy because of Egni's long term technical support.

Local authorities noted that working with Egni helps them make real progress toward net zero targets. Egni's renewable installations also produced major environmental value, reducing over 9,200 tonnes of CO₂ over the three years of reporting in this analysis .

What It Means Across all projects

AAT delivers substantial social, environmental and economic value. People feel less isolated, more empowered, more confident, and better able to cope with everyday challenges. Organisations are saving money and progressing towards climate goals. Schools and pupils are learning about environmental issues in meaningful and creative ways.

AAT's work strengthens communities, supports vulnerable groups, promotes sustainable living, and contributes directly to the wellbeing goals of the Well-being of Future Generations (Wales) Act.

And finally, with improved communication, careful management of capacity, and continued investment in data collection, AAT has further potential to increase its impact in the years ahead.

It is recommended that findings from this report is used to adhere to the eighth principle of social value which is to be responsive. By illustrating what outcomes are most important to stakeholders, this report can help AAT to put actions in place where it matters, to continue to increase and maximise the positive social value created.

Acknowledgements

This report would not be possible without involving key stakeholders who can help us understand what changes have taken place and establish the impact of those changes. We are extremely thankful to the individuals who took part in activities and gave their time to help us understand what had changed in their lives as a result, as well as ensuring we can provide useful recommendations to Awel Aman Tawe to build on and maximise this impact in the future.

Thank you to the staff, volunteers, trustees and project partners at Awel Aman Tawe for their time to go through the project with us in great detail and for their support in collecting both qualitative and quantitative data. This evaluation would not be possible without all their support.

Diolch yn fawr / Thank you

Social Value Cymru



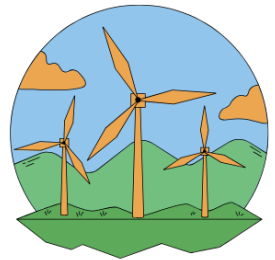
Social Return on Investment Report January 2023 - December 2025

HWBY GORS VOLUNTEERS

- 86%** of volunteers feel less isolated and lonely.
- 95%** of volunteers feel proud to be helping others in their community.
- 86%** of volunteers report an increased sense of purpose.

HWBY GORS PARTICIPANTS

- 72%** of participants report improved mental well-being.
- 83%** of participants feel they have developed new skills.
- 83%** of participants experience a stronger sense of belonging.
- 69%** of participants reported frustration with communication around the opening of Hwb y Gors.



TAITH CO-OP

- 96%** of clients feel they have greater freedom and independence.
- 92%** of clients feel less isolated and lonely within their community.
- 93%** of clients said they were less worried and stressed about transport costs.

WE ARE ENERGY WARRIORS

- 100%** of participating schools report that their pupils have greater knowledge and awareness of the environment, climate change, food waste and energy waste.
- 100%** of schools note that pupils have developed a strong sense of ownership over their work leading to increased interest in environmental issues.
- 100%** of schools suggest that pupils feel more empowered to make more informed decisions about the environment.
- 100%** of teachers feel more confident teaching about environmental topics at their school.

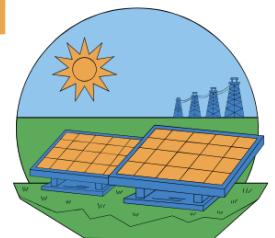


ENERGY ADVICE SERVICE

- 58%** of clients report savings on their energy bills.
- 67%** of clients feel they have greater knowledge and awareness of energy efficiency measures.
- 54%** of clients report having changed their behaviour towards energy usage.

EGNI CO-OP

- 94%** of clients have been able to save money on their energy bills.
- 100%** of clients report increased knowledge and awareness of energy measures and actions.
- 94%** of clients say they have greater capacity to manage their energy matters.
- 100%** of local authorities collaborating with Egni Co-op feel more confident that their energy measures and actions will contribute to meeting national carbon reduction targets.



**Awel Aman Tawe have
created over £7.1m of
social value, and a SROI of:**

£1.69

Range £1.43 - £1.90



*Please see the full report for further information

1.0 Introduction

This Social Return on Investment (SROI) report will analyse the social value created by Awel Aman Tawe (Charity number: 1114492) through their various projects and services which includes Hwb y Gors, We Are Energy Warriors (school education programme), Taith Co-op (community transport), Energy Advice Service and Egni Co-op (rooftop solar) between January 2023 – December 2025. The report has been commissioned by Social Investment Cymru (SIC), the social investment arm of the Wales Council for Voluntary Action (WCVA) who are celebrating their 20-year anniversary in 2026. Awel Aman Tawe (AAT) were one of the first organisations to obtain a loan from SIC to develop their work and AAT have built on this initial investment and now have multiple successful projects they are delivering in 2025.

AAT was established in 1998 and now has over two decades of experience in researching, developing and delivering projects that address the climate emergency. AAT believe in driving forward a shift towards a greener, fairer economy and enabling communities to be more resilient. Their main goals are tackling climate change, job creation, retaining wealth in the Welsh economy and engaging people in energy matters. AAT have set up two co-ops, Awel Co-op and Egni Co-op with over 1500 members:

- Awel Co-op, is a 4.7MWp community wind farm which was commissioned in Jan 2017.
- Egni Co-op develops rooftop solar on schools, businesses, and community buildings. It has installed over 5MWp on over 100 sites in Wales. And It is now also installing Smart Energy Systems (SLES) alongside the solar which includes batteries and EV charge points.

Working through Awel and Egni Co-ops, AAT staff not only help generate cheaper, greener electricity, but also help to fund their education and arts programmes (We are Energy Warriors). AAT also run a community Electric Vehicle transport scheme through Taith Co-op,

and their new eco community centre Hwb y Gors will be a sustainable hub for creatives, educators, entrepreneurs, and the local people.¹ Further information about Hwb y Gors can be found on their website: (<https://hwbygors.cymru/>)

Through engagement with people in the community who participate in AAT activities and projects, community groups, and schools, and from examination of information and data available, appropriate estimations have been made of the social return on investment, supported by secondary evidence.

This report focuses primarily on assessing the social value and the well-being impacts of AAT's projects. The report does not include an evaluation of AAT's environmental impact, as this outside the scope of the analysis we are evaluating in this analysis.

This report will analyse the findings from these projects using the Social Return on Investment (SROI) framework to complete an evaluation report to December 2025 and will provide recommendations for improving impact.

¹ <https://aat.cymru/about-us/>

2.0 Purpose, Scope & Audience

2.1 Purpose and scope

The purpose of the analysis is to provide valuable insights into the changes experienced by key stakeholder groups. This report looks specifically at the outcomes and their value for AAT's various stakeholders including beneficiaries, staff, project volunteers and strategic partners.

This report aims to understand the experience of the stakeholders and establish the following:

- The views of the key stakeholders involved in the projects including beneficiaries, clients and volunteers
- The outcomes experienced by other material stakeholders, including partner organisations.
- To give value to the project and to answer the question: 'Does AAT through their various projects provide social value to their local community?'
- To see what changes to the organisation can be introduced to provide more outcomes for their stakeholders.

2.2 Audience

This report has been prepared for both internal and external audiences. For internal stakeholders, the analysis aims to provide a thorough understanding of the changes created through the activities of the projects. This includes assessing both positive and negative changes, as well as intended and unintended results. By gaining insights into these changes, decision-makers at the management level can make more informed decisions and improve the value created by the projects.

For external audiences, the aim is to effectively communicate the impact of funding to funders and commissioners to see how positive outcomes can be enhanced and any negative outcomes mitigated. Ensuring the involvement of all stakeholders allows a clear understanding of the changes and allows the needs of local communities to be aligned with strategic decision-making.

3.0 Background & Context

3.1 Key Organisation(s) and the need for the service.

Background

AAT is a community energy charity and social enterprise which was set up in 1998. It was created by local people in the Upper Amman and Swansea Valleys. The aims of the organisation are to:

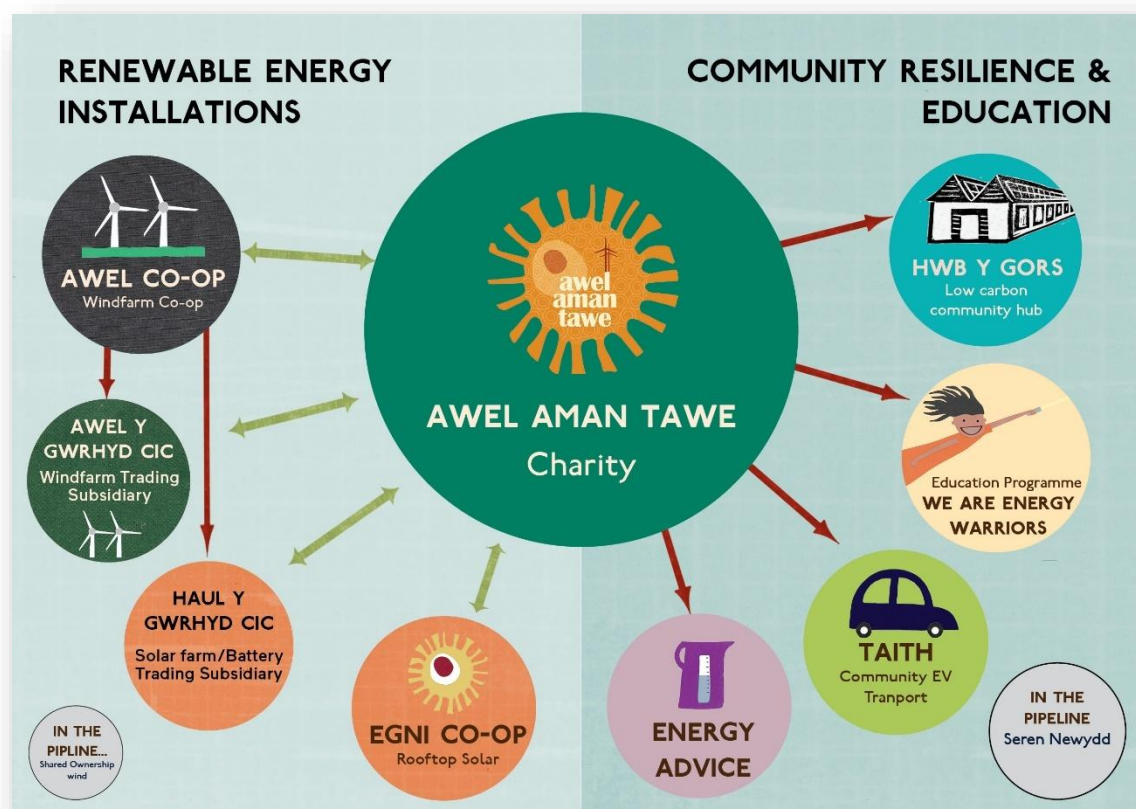
- Help regenerate the former coal mining community which comprises 11 villages
- Follow a community asset-based development approach
- Tackle climate change and support a transition to net zero.

Awe Aman Tawe main goals are: environmental; job creation retaining wealth in the Welsh economy and involving people in energy through social enterprises. Surplus from the co-ops and other income has enabled the charity to create 25 jobs in the local area. Over the years AAT have expanded and now operate across south Wales through their various projects.

3.2 Project(s)Outline

As of November 2025, have multiple areas of work through their community-based projects across south Wales: Awel Co-op, Egni Co-op, Taith Co-op, Hwb y Gors, We are Energy Warriors (education programme) and the Community Energy Advice Service. Figure 1 below shows the structure of AAT projects.

Figure 1 - Awel Aman Tawe Structure



3.2.1 Awel Co-op

Awel Co-op is their two-turbine 4.7 Mw community windfarm on Mynydd y Gwrhyd, 20 miles north of Swansea. The windfarm generates enough power for 2500 homes. All surplus goes towards developing further low-carbon projects including Hwb y Gors, Taith Co-op, and climate change education² We Are Energy Warriors.



² <https://aat.cymru/awel/>

3.2.2 Egni Co-op

AAT established Egni Co-op in 2015 as a pilot scheme on 7 community buildings. From 2019-21, they expanded Egni and developed a further 90 sites across Wales. To fund this expansion, AAT raised £5m in community shares and over £2m from the Development Bank of Wales³. Egni Co-op develops rooftop solar energy in Wales and now has more than 5 MWp of capacity on over 100 sites, including schools, community buildings and businesses. All surplus generated through Egni Co-op is then reinvested into climate change education in schools through the *We are Energy Warriors* programme.



3.2.3 We are Energy Warriors

Through their education programme, *We are Energy Warriors*, AAT work with Egni schools to run creative and fun workshops with local artists and scientists to support pupils and teachers to take action on climate change. The We Are Energy Warriors programme also works in partnership with another charity, Energy Sparks, who have a data platform and

³ <https://aat.cymru/egni/>

dashboard for electricity, gas, and solar usage in schools so children can see and measure what impact their energy saving activities have⁴. Further information on the energy data for Pembrokeshire and Newport schools can be seen here;

Pembrokeshire: https://energysparks.uk/school_groups/pembrokeshire

Newport: https://energysparks.uk/school_groups/newport

3.2.4 Hwb y Gors and outreach

AAT have redeveloped the former Cwmgros primary school which closed in 2015 into Hwb y Gors, a zero-carbon community hub that was once the Cwmgors primary school in the Aman valley. AAT have raised over £2.5 million for the restoration of the old school building. They have been working hard for a number of years to preserve many of the old school features and retrofit it to be a low-carbon building. Inside will be a community café, co-working studios and enterprise spaces, the community electric transport scheme, a hall and education facilities and community garden⁵.

Hwb y Gors officially opened to the public with a soft launch in September 2025. During the refurbishment period, activities normally held at Hwb y Gors were relocated to Cwmgors Community Hall. For the purposes of this report, findings for Hwb y Gors therefore include both on-site activities and outreach work.

Most workshops and activities held at the community hall were delivered for the benefit of Hwb y Gors alongside the community. For example, although the tiling and stained-glass clubs could not run at Hwb y Gors during the refurbishment, the work produced by participants has since been installed at Hwb y Gors to showcase and celebrate their achievements.

⁴ <https://aat.cymru/education/>

⁵ <https://aat.cymru/hwb-y-gors/>



3.2.5 Taith Co-op

Taith Co-op is a community electric transport scheme that provides support for vulnerable people in Neath Port Talbot, Swansea and Carmarthenshire. Through Taith Co-op, AAT staff are able to take people to hospital appointments, work placements, social activities and to school / college. The Taith Co-op team works with organisations such as Jac Lewis Foundation, Your Voice Advocacy, Pontardawe Old Age, Vivian Park, and Park Row Supported Living to be able to provide the transport service these group's needs⁶.

3.2.6 Energy Advice Service

AAT employ two energy advisors who are qualified to National Energy Action level 3, Domestic Energy and Retrofit Assessors. They offer energy advice to local householders and support them to apply for grants for renewables and energy improvements to their

⁶ <https://aat.cymru/taith/>

homes. The service is funded by the Energy Industry Voluntary Redress Scheme and aims to help people in the community on a one-to-one basis. The two energy advisors also work closely with the local authorities, partners and referral agencies to be able to support their clients in a holistic way. The energy advisors offer expert, independent, one-to-one energy advice, including⁷:

- Help with energy supplier calls (e.g. debt queries, switching tariffs, meter issues, or changing suppliers)
- Tailored referrals to other services that can help a person in their situation
- Guidance on grants and schemes that suit their needs
- Practical tips to save energy and money at home
- Help with heating and boiler controls

⁷ <https://aat.cymru/the-energy-team/>

3.3 Establishing the need for community energy

Since the pandemic, the energy landscape has been really challenging for UK households and businesses as energy prices increased drastically. When economies started opening up again, demand for gas rocketed, and then Russia's invasion of Ukraine in February 2022 made everything much worse. Wholesale gas prices soared, pushing domestic energy bills to near record costs – the Ofgem price cap alone jumped by 54% in April 2022⁸. With around 85% of homes in the UK relying on gas for heating and a big portion of electricity coming from gas too, the sudden price surge created a huge cost-of-living crisis, leaving millions struggling to pay their bills and making existing inequalities even worse, according to the UK Government⁹.

The energy crisis has highlighted the UK's vulnerability to global, particularly European, energy markets due to its heavy reliance on imported gas. As reported by the Energy Crisis Commission in October 2024¹⁰, the UK remained poorly prepared for future energy crises beyond 2025. The report emphasises the need for a fairer and more stable energy system—one that prioritises local ownership, improves energy efficiency, and supports community-led renewable projects—so that communities across Wales and the wider UK can achieve lasting social, economic, and environmental benefits.

The community energy is a growing sector in Wales with the movement towards greener and locally produced energy increasing¹¹. Due to the recent energy crisis the UK, the number of people in fuel poverty has increased. People are now looking at other ways to source and generate their own energy within their local communities. Furthermore, local community

⁸ www.ofgem.gov.uk/

⁹ <https://www.gov.uk/government/publications/hydrogen-heating-overview/hydrogen-heating-overview--2>

¹⁰ <https://energycrisiscommission.uk/wp-content/uploads/2024/10/energy-crisis-commission-report-october-2024.pdf>

energy projects are also a good way to bring communities together. In a recent report published by the Energy Learning Network, they state:

“Community energy is a powerful force making the net-zero transition faster, fairer, and more inclusive - bringing communities together, driving local action, and turning collective effort into lasting impact.”

In a report published by National Energy Action, Welsh Government estimates that 25% (340,000) of all households in Wales were in fuel poverty in late 2024. Furthermore, 83% (195,000) of all Wales’ lower-income households were estimated to be in fuel poverty at that time, almost a quarter of whom (56,000) were classed as severe¹²¹³. In the December 2024, Ynni Cymunedol Cymru (Community Energy Wales) published their annual “State of the Sector¹⁴” report which puts a spotlight on the community energy sector in Wales. The four main headlines from the report noted;

- 1) There are currently 47 active community energy groups and umbrella organisations based within Wales.
- 2) The Welsh Government are committed to a Net Zero carbon emissions in Wales by 2050 with 100% of its electricity from renewable sources, and 3.2MW of new renewable electricity capacity installed during 2023.
- 3) The total capacity of 32.4MW across Wales is from all the community energy groups and umbrella organisations (11% increase on the 2022).
- 4) There are 164 full time employees working in the sector, of which 15 were created in 2024.

¹² <https://www.nea.org.uk/fuel-poverty-map/fuel-poverty-in-wales/>

¹³ <https://www.gov.wales/climate-change-targets-and-carbon-budgets>

¹⁴ <https://communityenergy.wales/state-of-the-sector-2024>

These recent developments demonstrate the sector's steady growth and its role in delivering affordable, renewable energy while addressing fuel poverty and advancing Wales' net-zero goals.

Finally, the need for community energy in Wales fits closely with Welsh legislation, especially the *Well-being of Future Generations (Wales) Act 2015*. The legislation asks organisations to think long term, prevent problems before they get worse, involve local people, and protect the environment for future generations¹⁵. Community energy organisations support these aims by reducing carbon emissions, lowering energy costs and keeping decision-making within local communities. They can help tackle fuel poverty and reduce inequality, while also strengthening community resilience through local ownership and shared community-centered benefits. In doing so, community energy directly contributes to the Act's Well-being Goals, including A Resilient Wales, A More Equal Wales, A Prosperous Wales, A Healthier Wales, and A Wales of Cohesive Communities.

¹⁵ <https://futuregenerations.wales/discover/about-future-generations-commissioner/future-generations-act-2015/>

4.0 Social Return on Investment (SROI) Framework

By explicitly asking those stakeholders with the greatest experience of an activity, SROI can quantify and ultimately monetise impacts so they can be compared to the costs of producing them. This does not mean that SROI can generate an ‘actual’ value of change, but by monetising the value of stakeholder outcomes from a range of sources, it can provide an evaluation of projects that change the way value is accounted for – one that considers economic, social, and environmental impacts. The Institute for Social Value (2014) (formally Social Value UK) ¹⁶ states;

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

Based on eight principles, SROI explicitly uses the experiences of those who have or will experience changes in their lives as the basis for evaluative or forecasted analysis. Figure 2 outlines the Principles of Social Value.

Figure 2 - The Principles Of Social Value¹⁷



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 1), and these stories of

¹⁶ Social Value UK. www.socialvalueuk.org

¹⁷ <https://socialvalueuk.org/principles-of-social-value/>

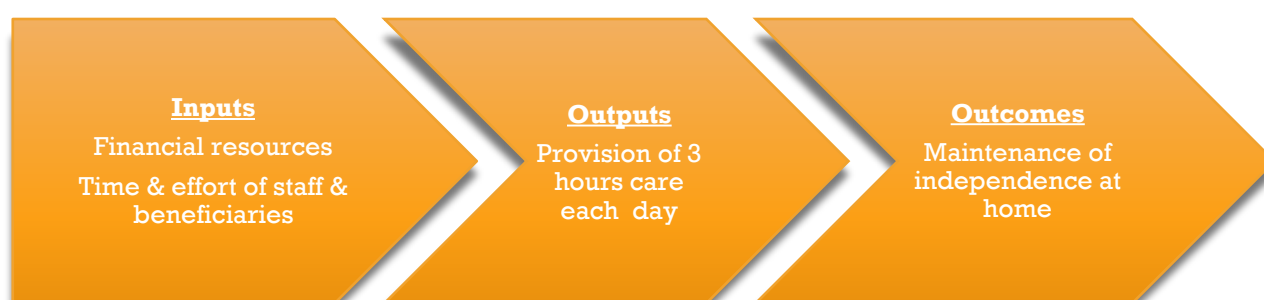
change are equally as important as the result of analysis. SROI is best thought of as a story of change with both quantitative and qualitative evidence attached to it. Figure 3 summarises the different elements for each chain of change included within the SROI analysis (before the impact of outcomes is calculated).

Figure 3 – 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 the stakeholders. To illustrate this idea, Figure 4 displays a brief chain of change for a domiciliary care programme to assist people to remain in their own homes - only by measuring the final outcome is it possible to understand the impact of the care programme.

Figure 4 – Example of a 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 activity or intervention. Importantly, SROI can capture positive and negative changes, and where appropriate these can also be projected forward 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 can create an understanding of the value of activities relative to the costs of creating them. It is not intended to reflect 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 outcomes are organisations able, not only to demonstrate their impact, but also importantly to improve them. This thereby strengthens accountability to those to which they are responsible, which, in the case of the third sector is fundamentally the key beneficiaries of services.

The Big Switch Off



Egni Co-op

Holiday Energy Savings Across Newport and Pembrokeshire Egni Schools

Overview

Egni Co-op's Schools Big Switch Off initiative encourages schools to reduce unnecessary energy use during holidays by switching off equipment, heating, and hot water systems. A recent review through Energy Sparks showed of 52 schools across Newport and Pembrokeshire shows that even simple behavioural changes can deliver significant financial savings and carbon reductions.

Headline Results

Newport

Electricity: 12 of 21 schools reduced use over the summer break, with average savings of 12% (equivalent to £174 in primaries and £684 in secondaries).

Gas: 15 of 22 schools reduced consumption—an impressive 45% average reduction. All but one secondary school made savings. Average savings: £158 (primary) and £351 (secondary).

Pembrokeshire

Electricity: 14 of 31 schools reduced consumption. Savings averaged 18%, worth £259 for primaries and £2,640 for the one secondary with available data.

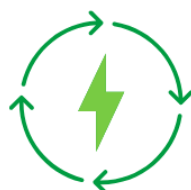
Gas: 14 of 18 schools reduced consumption by an average of 42%, all in primary schools. Average saving: £129.

Success Stories

Newport

Caerleon Comprehensive School: Achieved its lowest baseload since August 2019, suggesting an excellent holiday switch-off. Likely supported by an LED upgrade in one block. Electricity saving: £1,450. Gas saving: 10% reduction.

Rogerstone Primary School: 22% electricity saving (£522), likely from fully switching off hot water or similar systems previously running all summer.



Pembrokeshire

Puncheston Community Primary School: 76% reduction in electricity use (£1,260) after placing the hot water boiler on a timer.

Coastlands CP School: 40% electricity saving (£286) through a well-managed whole-school switch-off.

Ysgol Harri Tudur: 29% reduction in electricity use (£2,640)—one of the strongest examples of thorough holiday shutdown procedures.

Conclusion

The Big Switch Off demonstrates that simple, low-cost actions can deliver meaningful financial and environmental benefits for schools. With consistent behaviour and small technical improvements (e.g., timers, LED upgrades), schools can continue to reduce baseload energy use, save money, and cut carbon emissions across future holiday periods.

5.0 Stakeholder engagement

Including stakeholders (Principle 1) 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.

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 problems faced by the stakeholders, and their most important outcomes, based on the concepts of relevance and significance (see Figure 5). The former identifies if an outcome is important to the stakeholders, and the latter identifies the relative value of changes. Initially, for this evaluation of AAT, a range of stakeholders were identified as either influencing or being affected by the project – Table 1 highlights each stakeholder, identifying if they were considered material or not for inclusion within the SROI analysis. Table 2 below shows the number and type of stakeholder engagement made for the analysis.

Figure 5 - Materiality principle

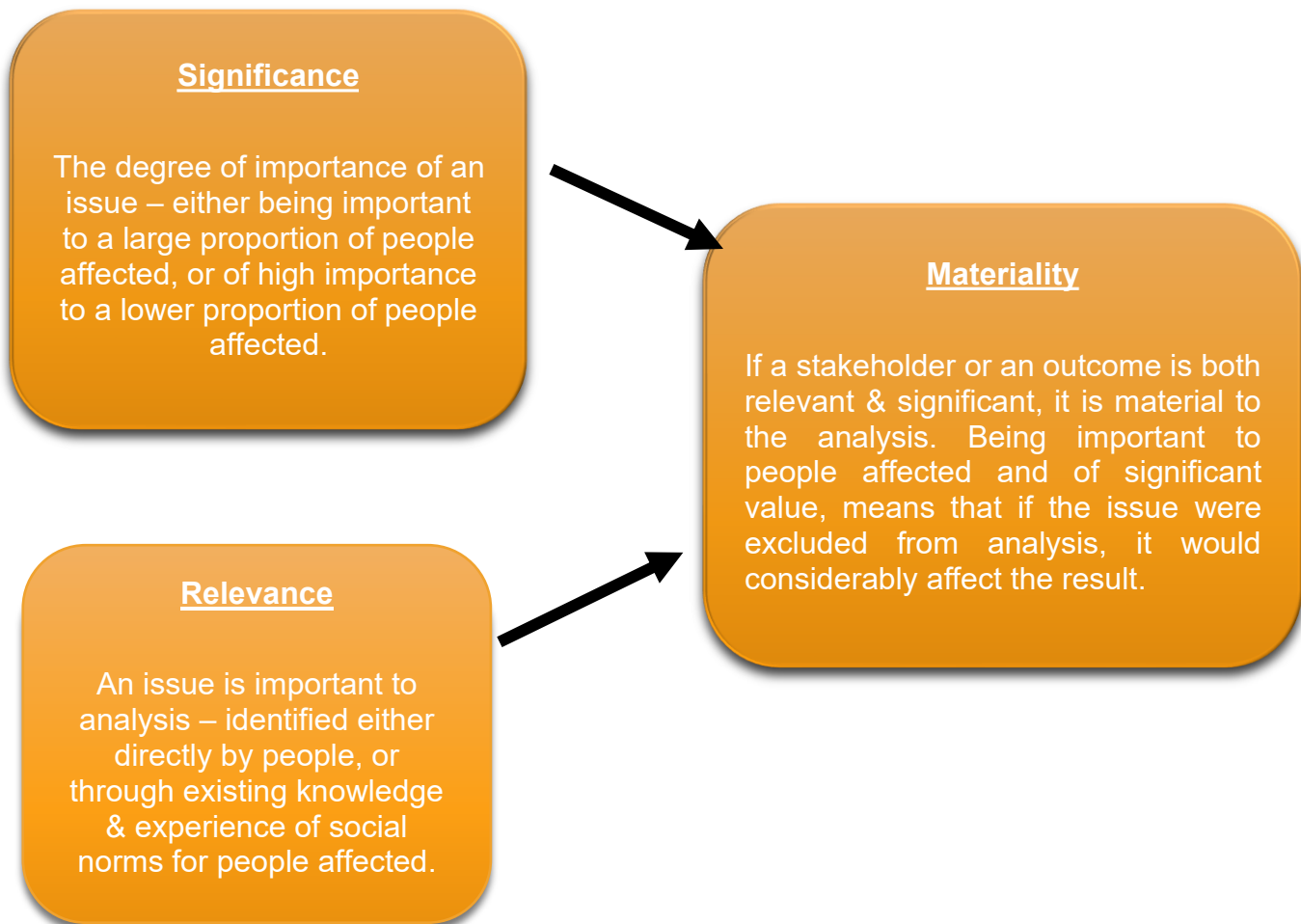


Table 1: Stakeholder List & Materiality

Project	Stakeholder	Material stakeholder?	Explanation
Hwb y Gors and outreach	Participants	Yes	They are the beneficiaries that experience positive material outcomes due to attending sessions at Hwb y Gors and outreach.
	Volunteers	Yes	They attend some sessions and also support Hwb y Gors staff in other workshops and events such as the repair café. Through their regular attendance they experience positive material outcomes themselves and also contribute to the participants experiencing their own outcomes.
	Partners / Artists	No	They are important to the success of workshops and activities held at Hwb y Gors and outreach; their actions lead to the material outcomes identified for both participants and volunteers. However, as a stakeholder they were beyond the scope of the evaluation.
Taith Community Transport	Clients	Yes	They are the main beneficiaries of the project and experienced both relevant and significant outcomes, therefore a material stakeholder.
	Drivers	No	Their work contributes and leads to the clients experiencing their identified material outcomes.
	Volunteers	Yes	The volunteers are a key stakeholder group and likely to experience both relevant and significant changes. However, during the stakeholder engagement process none of the volunteers wanted to participate in the interviews / focus groups and therefore we were not able to identify any outcomes for this group. However, the volunteers contributions and the time they give to the project do ensure the clients experience their outcomes.
	Partners / referral agents	No	Partners are an important stakeholder group for Taith. However, partners and Taith work together for clients to be able to experience the material outcomes identified.

We Are Energy Warriors	School pupils	Yes	They are the main stakeholder group who benefit from the We Are Energy Warriors project, therefore have both relevant and significant outcomes. Also, the material outcomes identified are likely to have long term impact.
	Teachers	Yes	Although the project is aimed at improving the understanding of energy and climate change for the pupils, the teachers are also benefiting from the project, and some material outcomes have been identified through the stakeholder engagement process.
	Artists / Scientists	No	They are a key stakeholder group for the success of the project; however, their actions and inputs to the programme lead to outcomes identified for both pupils and teachers.
	Energy Sparks	No	All of the schools on the project are enrolled onto Energy Sparks to track and better understand their energy usage, and that helps them towards experiencing the outcomes identified. However, Energy Sparks themselves do not meet the materiality threshold in this evaluation.
Energy Advisors	Clients	Yes	They are the main beneficiaries of the project through the support and guidance they have been given by the energy advisors which leads to the identified material outcomes.
	Referral Agents	No	They work closely with the energy advisors to provide holistic support for the clients. However, during no material outcomes were identified.
Egni	Sites / clients	Yes	They are the main beneficiaries of the project through the installation of solar PV and other clean energy.
	Local Authority	Yes	Through their relationship and collaboration with Egni, some material outcomes have been identified.
Co-op members	Both Awel and Egni co-op members	No	Limited stakeholder engagement was possible with the co-op members therefore no material outcomes were identified.

Table 2: Engagement with stakeholders

Project	Stakeholder	Population size	Method of engagement
AAT	Management	3	- Various meetings throughout both online and in-person at Hwb y Gors .
	Project staff	14	- 8 meetings with all the project leads and staff at the start to establish a stakeholder engagement plan for each project. - A total of 6 meetings with all project leads to discuss findings from the stakeholder engagement and verify the Theory of Change for each projects.
	Trustees	8	- 4 interviews with trustees, 2 phone interviews and 2 online interviews.
Hwb y Gors and community outreach	Participants	200	- 1 in-person focus group including 6 participants (3 male, 3 female) - 29 surveys (15% sample size)
	Volunteers	53	- 1 in-person focus group including 7 volunteers (5 female, 2 male) - 21 surveys (40% sample size)
Taith Community Transport	Clients	600	- 1 in-person interview (on a journey with a client) - 8 phone interviews - 83 surveys (14% sample size)
	Drivers	3	- 3 in-person interviews with a drivers - A phone interview with the other driver
	Volunteers	11	- No volunteers chose to take part in the interview process
	Partners	10	- Online interviews with 4 partners - A phone interview with 2 partners

We Are Energy Warriors	Schools	60	- 3 online interviews - 9 surveys (15% sample size)
	Local Authorities	3	- 2 online interviews with two different local authorities - 1 survey
Energy Advisors	Clients	77	- 1 in-person focus group including 6 clients - 1 in-person interview - 2 phone interviews - 24 surveys (31% sample size)
	Referral agents	Various	- 1 in-person interview - 1 phone interview
Egni Co-op	Clients (sites)	50	- 3 online interviews (the same schools as for We Are Energy Warriors) - 2 interviews with community organisations - 16 surveys (32% sample size of sites that have solar panels)
	Local Authorities	3	- 2 online interviews
Co-op members	Shareholders in Awel and Egni Co-ops	1,500 members	- 1 online interview with a person who is a member of both co-ops

The potential subgroup of stakeholders

Individuals, communities and groups differ significantly, and analysing results by key characteristics helps identify diverse needs and supports better decision-making. This section reviews charts and project characteristics to highlight potential stakeholder by subgroups such as age, gender and location based on survey responses. Where possible we looked at multiple different characteristics for each stakeholder group and project with the exception of We Are Energy Warriors where it was only possible to identify one potential subgroup.

5.1 Hwb y Gors and outreach

5.1.1 Participants

Chart 1: Hwb y Gors - Participant Age

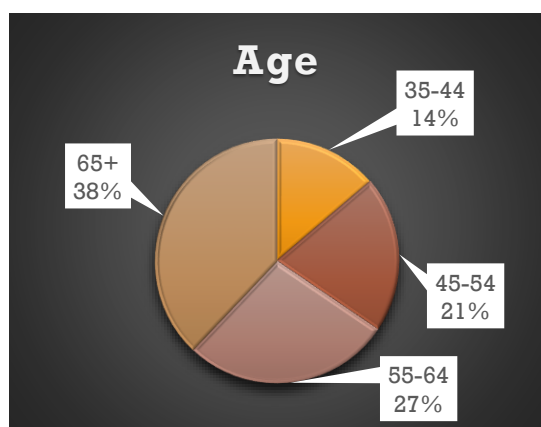


Chart 2: Hwb y Gors - Participant Location

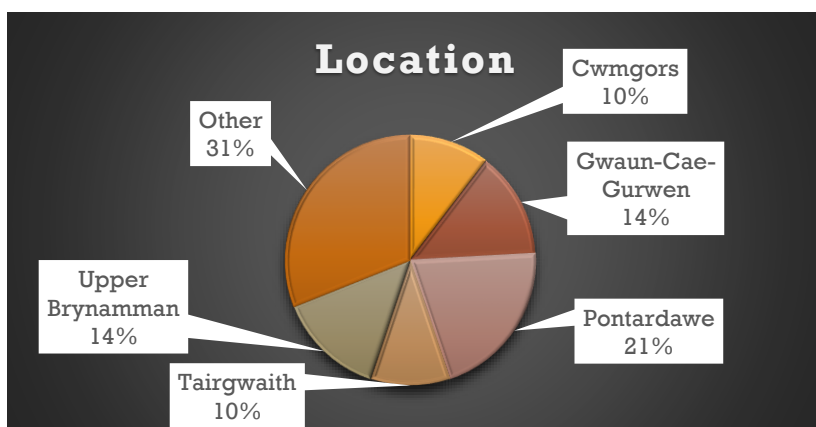
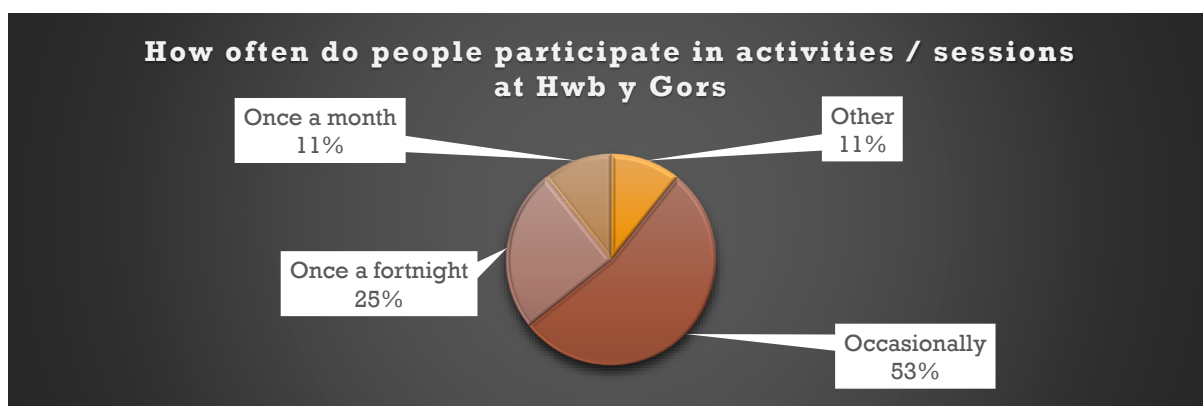


Chart 3: Hwb y Gors - How Often Do Participants attend workshops and activities



5.1.2 Volunteers

Chart 4: Hwb y Gors - Volunteer Gender

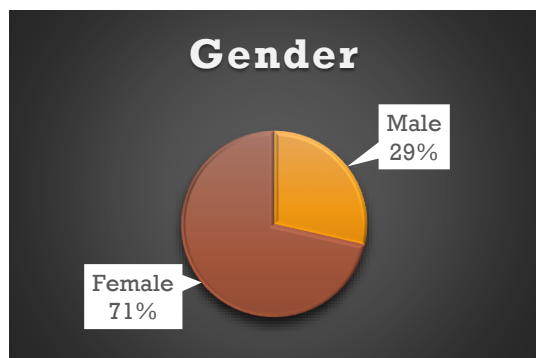


Chart 5: Hwb y Gors Volunteers - How Often Do You Volunteer

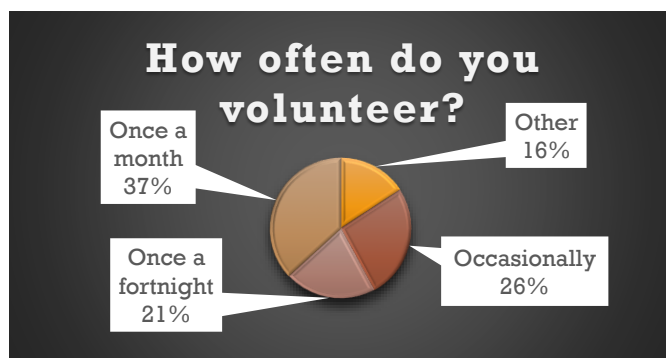


Chart 6: Hwb y Gors Volunteers – What Activity or Workshop Do You Volunteer At



5.2 Taith Community Transport

Chart 7: Taith - Clients Gender

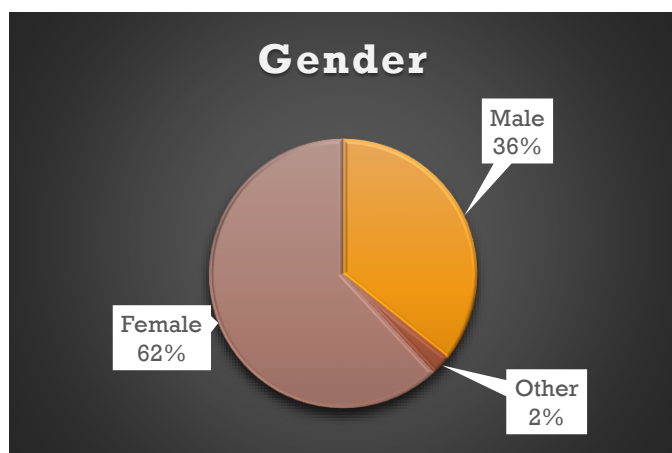


Chart 8: Taith - Clients Age

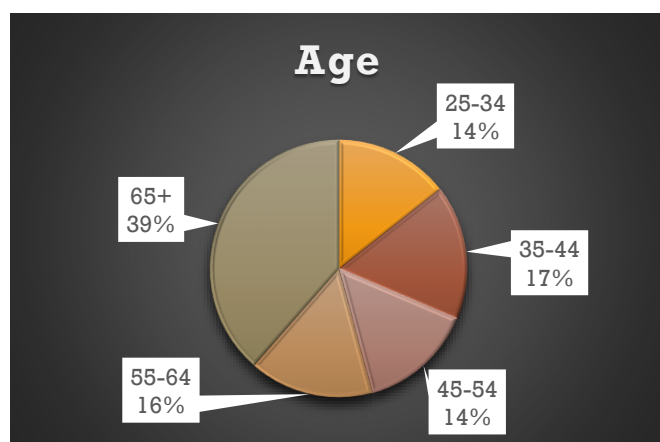


Chart 9: Taith - What Community Are The Clients A Part Of

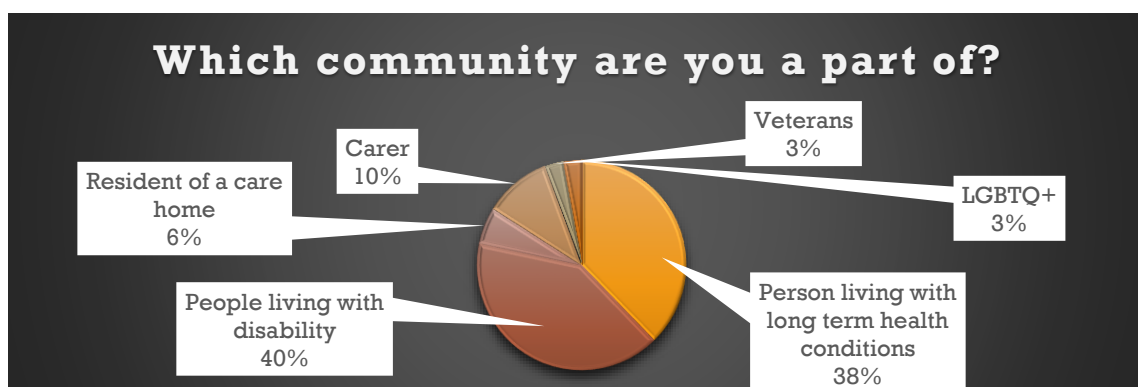
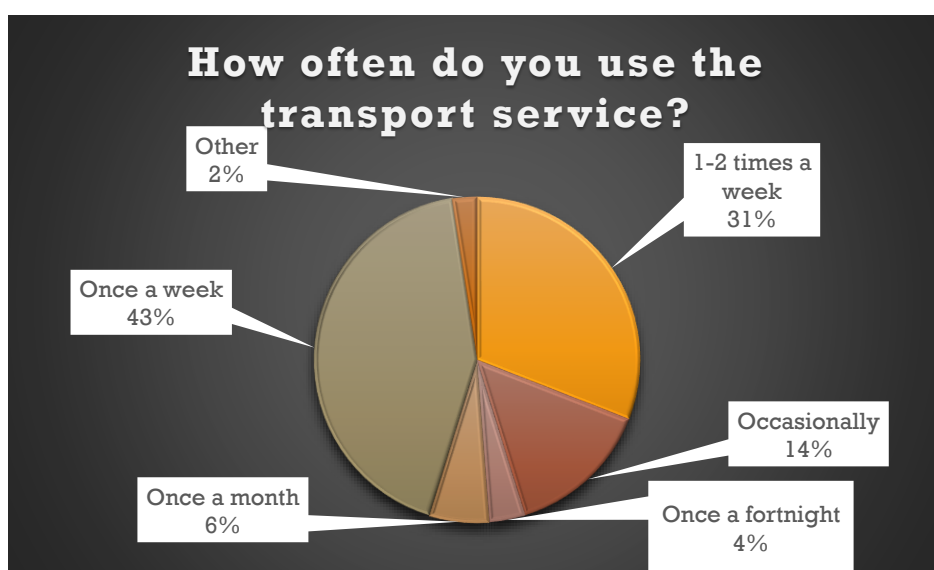
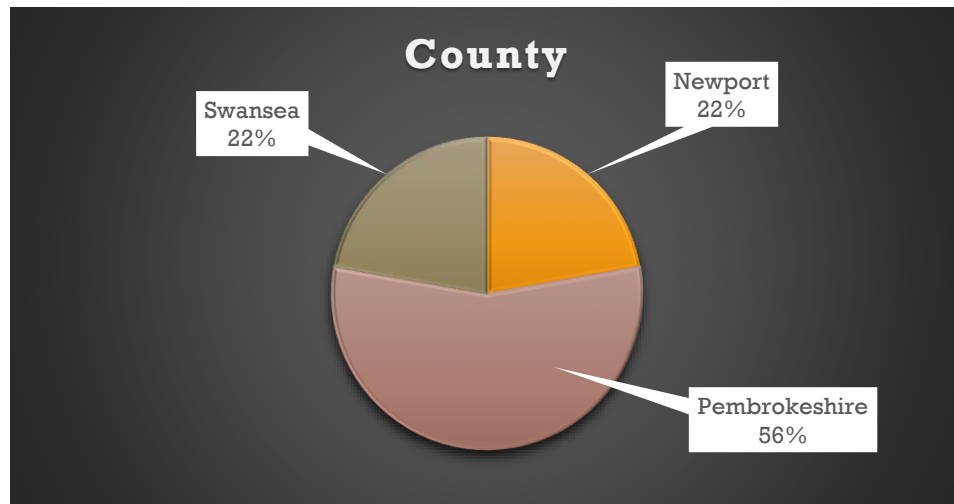


Chart 10: Taith - How Often Do Clients Use The Service



5.3 We Are Energy Warriors

Chart 11: We Are Energy Warriors - In Which County is the School



5.4 Energy Advice Service

Chart 12: Energy Advice Service - Clients Gender

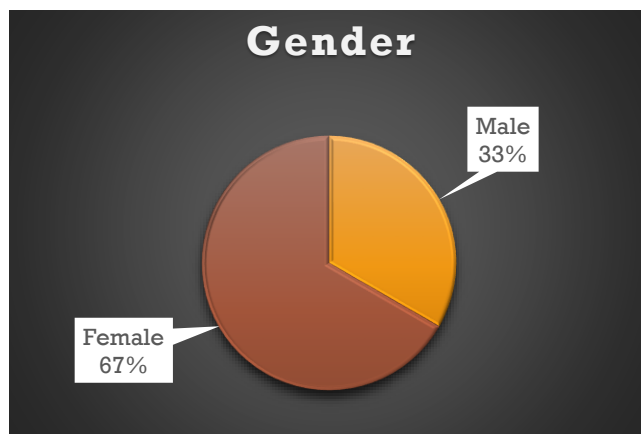
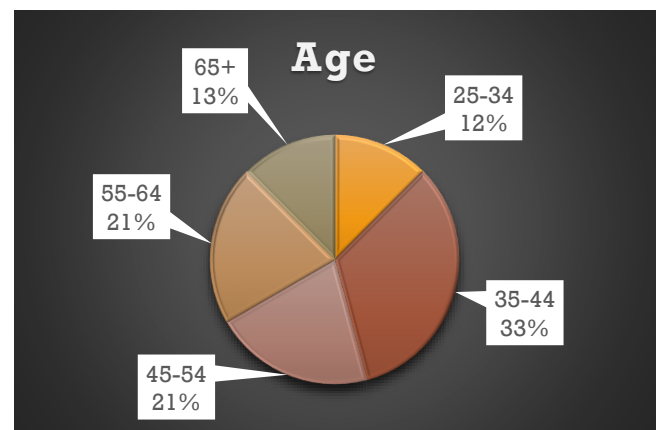


Chart 13: Energy Advice Service: Clients Age



5.5 Egni Co-op

Chart 14: Egni - Organisation Sector

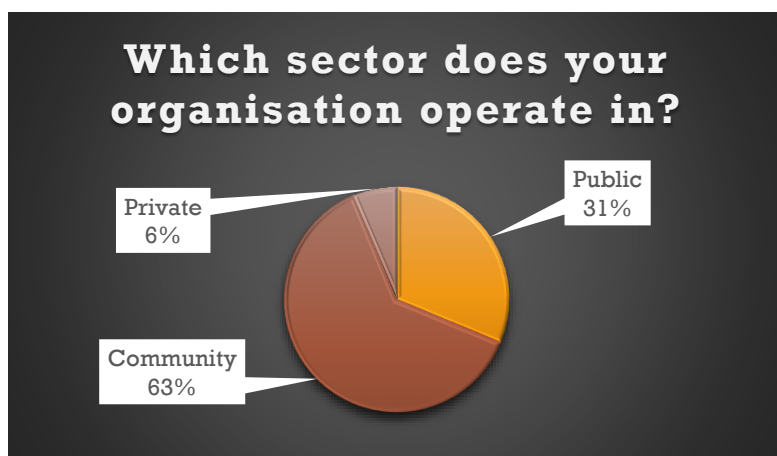


Chart 15: Egni - Organisation Region

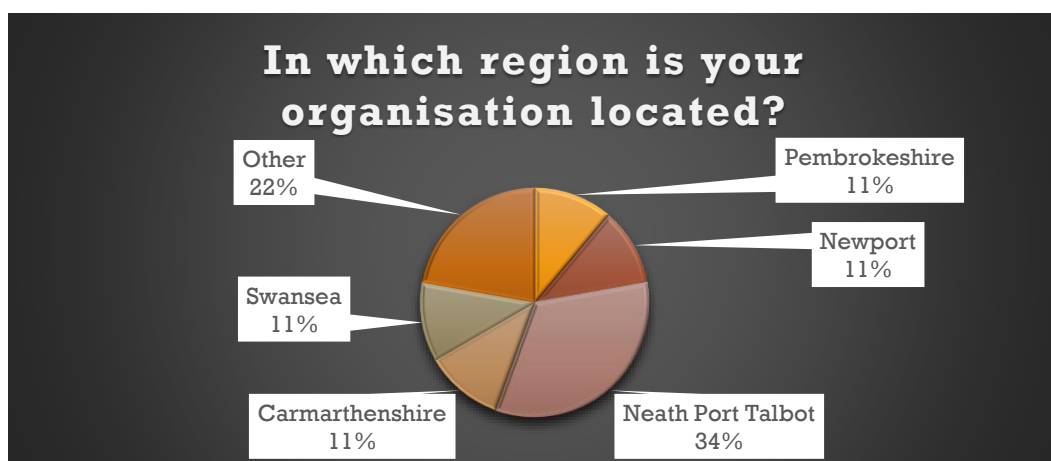
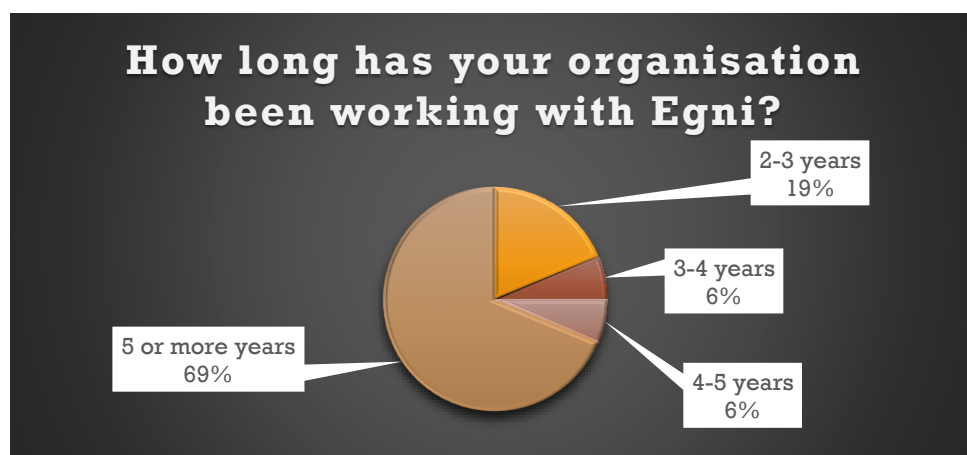


Chart 16: Egni - How Long Has The Organisation Been Working With Egni





Hwb y Gors

'A' story

Person A started attending Awel Aman Tawe's community-based workshops in Spring 2022 to accompany her eldest daughter who is a creative person and interested in the textiles and ceramics projects. She had not planned to take part at all but soon found herself joining in, enjoying herself so much that she started booking herself onto workshops and events.

She always finds the AAT workshops of a high quality, well explained with different tutors and she loves that she never has to bring anything as everything is always provided. Workshops are always enjoyable, interesting and she has learnt so much that she wouldn't have done had this not been held in her community.

She thinks it is fantastic now the Hwb has opened, finding it a lovely, warm and inclusive space and really important for the local communities. A space that has been missing in the village for many years.

Becoming involved in so many aspects of Hwb y Gors has had a huge positive impact on her mental health. Before accompanying that first workshop in May 2022, person A had been struggling with her mental health after a number of bereavements that devastated her and this whole community. She had reached the point of barely talking to anyone but the events and workshops helped her start socialising again.

She now volunteers with Hwb y Gors but doesn't see it as volunteering, just 'helping out' and she has since become a trustee in another local charity after starting to volunteer there in the Winter of 2022. Looking back, she doesn't even see this as a leap from where she was and how she felt in 2022 but a natural progression, really enjoying being involved in her community again.

26.0 Project Inputs

This section of the report describes the necessary inputs from multiple stakeholders. Some inputs are financial, whereas others are not – where possible, inputs are monetised. Without the necessary complement of inputs from various material stakeholders, the projects would not be possible. A full breakdown of total monetised inputs is highlighted in Table 9.

Financial inputs for 2023 and 2024 were taken from AAT's published Accounts, specifically expenditure on charitable activities. Most project inputs are funded through AAT, with additional contributions included such as participant costs and volunteer time at Hwb y Gors.

As official accounts for 2025 are not yet available, figures up to 31 October 2025 were provided by management, with forecast estimates for November and December prepared in line with the transparency principle and agreed with management. Table 3 outlines the financial inputs used in the value map across the three years, including project costs, wages, professional fees, and office costs, as well as the forecasting breakdown.

Table 4 summarises total inputs for each year. Care was taken to ensure all figures were conservative as possible to avoid overestimating the SROI.

6.1 Awel Aman Tawe

Table 3: Awel Aman Tawe - Financial Inputs Breakdown

	Expenditure on Charitable Activities (£)	2023	2024	2025
1	Project and employee costs	393,834	580,776	524,893
2	Rent, rates and water	615	4,201	543
3	Insurance	4,732	37,441	11,905
4	Light and heat	11,932	12,246	7,352
5	Telephone	2,036	4,585	3,016
6	Office costs	27,597	12,395	4,405
7	Photocopying	362	956	340
8	Marketing and advertising	1,428	3,175	3,625
9	Travel and motor	16,829	22,791	12,175
10	Professional fees	38,940	70,731	99,293
11	Subscriptions and membership	6,987	12,413	5,591
12	Training costs	2,159	6,922	5,634
13	Repairs, maintenance, and equipment	7,119	10,192	21,555
14	Grants payable	/	2,000	/
15	Depreciation	85,605	87,524	/
16	Finance charges	19,118	22,787	1,211
17	Interest payable - Solar panels	194,093	157,309	15,656
18	Interest on GSHP loans	5,274	5,044	/
19	Support costs			
20	Accountancy fees	20,274	23,801	15,032
21	Legal fees	26,597	10,602	35,559
				Total costs: 767,787
				Forecast final 2 months: 153,557
	Total costs	£865,531	£1,087,891	£921,344

Table 4: Awel Aman Tawe - Total Financial Inputs

AAT total included in the value map as inputs	2023	2024	2025	Total
	£865,531	£1,087,891	£921,344	£2,874,766

6.2 Hwb y Gors

6.2.1 Volunteers

Volunteers give their time and expertise to support activities, and their time can be monetised. Table 5 below shows the total hours given by the volunteers for all the activities and workshops in each years. The volunteer hours will be costed as the same value as the national living wage and since this report is evaluating multiple years, we will use the national living for 2025 of £12.21¹⁸ for each year to keep the input figures consistent.

Table 5: Hwb y Gors - Volunteer Hours As A Financial Input

Year	Total number of hours volunteered	Cost of volunteered hours as a financial input (x12.21/hour)
2023	1,411	£17,228.31
2024	985	£12,026.85
2025	506	£6,178.26
Forecast November and December	2025 hours to date (506) / 10 months* 2 (number of months forecasted) = 101 extra hours A total of 607 hours.	£1,233.21
Total	3,003 hours	3,003 x £12.21 = £36,666.63 (included in the value map)

6.2.2 Participants

Most of the Hwb y Gors and outreach activities are free for participants, with related costs covered by AAT and included in total inputs. The only participant cost is a £2 room hire fee per session for the Stitch Club. Due to data limitations, participant figures were only available for 2024 and 2025, so 2023 inputs and outputs could not be included. In 2024, 155 participants attended the stitch club, resulting in a total participant cost of £310.

¹⁸ <https://www.gov.uk/national-minimum-wage-rates>

In 2025, 147 people participated in the Stitch Club between January and October. A further 28 participants were forecast for November and December, giving a total of 175 participants included in the value map. This results in a participant cost of £350 for 2025 ($175 \times £2$). Combined with the 2024 cost of £310, total participant financial inputs for the Stitch Club amount to £660.

6.3 We Are Energy Warriors

No financial inputs were included for We Are Energy Warriors as the cost of the project is included in Awel Co-op and Egni Co-op inputs. The majority of schools are enrolled on to Energy Sparks at a cost of around £550 per year - all the costs are covered through Egni Co-op. Please see Table 7, line 12 for further details on the project cost for each year.

6.4 Taith Co-op

The majority of the inputs for Taith are included in AAT inputs such as staff costs. However, the income generated by Taith is also included in AAT accounts as the cost of service for the clients. Therefore, we will include the cost of service for the clients as an additional input for Taith. Without the clients paying for the service from Taith, they would not be able to experience the outcomes identified in the next section of the report. Table 6 below shows the income AAT have earned through Taith as reported in their financial accounts in each reporting year (2023: £9,845 & 2024: £13,879). Again, as with other projects, we will forecast the financial input for November and December 2025. From January – October 31st, AAT reported that Taith has earned an income of £10,488. Therefore, use the same calculation to forecast the income to the end of 2025 ($£10,488/10 \times 2$) = £2,098. Total financial input for 2025 = £12,586.

Table 6: Taith - Clients Inputs

2023	2024	2025	total
£9,845	£13,879	£10,488 reported + £2,098 forecast = £12,586	£36,310

6.5 Energy Advice Service

The project main aim is to tackle fuel poverty in Neath Port Talbot through providing advice and guidance to people in the community, funded by Redress. A small financial input for retrofit reports has been included in the value map. All other projects costs including the Redress project funding are included in AAT overall inputs, and therefore, we will only include once to avoid the risk of double counting inputs and potentially undervaluing the social value created by the project.

6.6 Egni Co-op

Table 7 below shows a breakdown of Egni Co-op cost of sales and administrative costs for the project. As with the financial inputs for AAT, Egni Co-op financial inputs for 2023 and 2024 have been verified and published through Egni Accounts for the year ended 31 December 2024. Management Accounts for Egni Co-op up to October 31st 2025 were provided, and in keeping with Principle 6 – Transparency, there has been some forecasting of the inputs for the final two months of the period we are evaluating, which is November and December. The forecast made in the inputs has been discussed with AAT management.

Overall, the inputs are steady across the three years when looking at cost of sales and administrative cost for Egni, consistent with the growth of the project. There was one significant additional capital cost in 2025, as Ynni Cymru grant - Installation costs with a value of £833,986 to cover batteries and charge points installation; “*Ynni Cymru grants cover*

installation costs for community renewable energy and Smart Local Energy Systems (SLES) in Wales¹⁹.

Although the reported Ynni Cymru grant value is £833,986 and other installation costs are £54,121.82 in Egni Co-op Accounts, we will only include 5% of these as an input in the report, as this tends to provide a more proportionate and fair reflection of social value generated within the reporting period. With any installation made by Egni, organisations are also provided with a long-term maintenance support over a 20-year period, ensuring installations continue to operate effectively. Therefore, £41,699.32 of the Ynni Cymru has been included as the financial inputs in the Value Map.

Some of the other project costs such as staff wages are included in AAT inputs (please refer back to Table 3, row 1) and therefore, we will only include once to avoid the risk of double counting inputs and potentially undervaluing the social value created by the project.

The financial inputs for Egni Co-op included in the value map and a breakdown for each year is shown in table 8. Total projects cost are **£1,303,741**, with the addition of the forecast figures for November and December 2025.

¹⁹ <https://www.gov.wales/ynni-cymru-capital-grant-funding-programme-2025-2026-guidance-html>

Table 7: Egni Co-op - Financial Inputs Breakdown

Egni cost of sales (£)	2023	2024	2025	
Rates and water	683	237	543	1
Insurance	21,201	18,549	21,608	2
Telephone/Internet /Metering	5,807	6,931	7,759	3
Travelling	172	142	88	4
Repairs, renewals & maintenance	54,280	51,225	78,613	5
IT and subscriptions	259	87	87	6
Training	275	0	0	7
Sundry expenses	0	500	12	8
Accountancy	9,032	6,336	5,657	9
Management and educational charge	56,514	125,000	128,125	10
Legal & professional services	6,875	21,994	8,512	11
Energy Sparks education costs	20,900	9,184	18,174	12
Donations	250	0	0	13
Ynni Cymru grant			41,699	14
Total Egni cost of sales	176,248	240,184	310,877	15
Egni Administrative expenses	260,456	193,916	49,904	16
			360,780	
Forecast November and December 2025			72,156	17
Total (Expenditure + Admin expenses+ forecast)	436,704	434,100	432,937	18

Table 8: Egni Co-op - Total Financial Inputs

Egni total included in the value map as inputs	2023	2024	2025	Total
	£436,704	£434,100	£432,937	£1,303,741

Table 9: Total monetised inputs

Project	Financial input			Total
	Year 1 (Jan – Dec 2023)	Year 2 (Jan - Dec 2024)	Year 3 (Jan– Dec 2025)	
Awel Aman Tawe	£865,531	£1,087,891	£921,344	£2,874,766
Hwb y Gors Participants	/	£310	£350	£660
Hwb y Gors volunteers	£17,228	£12,026	£6,178	£36,666.63
We Are Energy Warriors	Inputs for the project included in the inputs for Egni			
Taith Co-op	£9,845	£13,879	£12,587	£36,311
Energy Advice Service	Minor additional project inputs for retrofit reports			£3,250
Egni Co-op	£436,704	£434,100	£432,937	£1,303,741
Total monetised inputs				£4,255,393

- Forecast November and December 2025

7.0 Outputs, Outcomes, Indicators & Evidence

This section of the report will discuss the outputs and outcomes we have identified for each material stakeholder in each project. This includes the stakeholder engagement process, in the qualitative stage of our evaluation, and the evidence we have gathered through the surveys in the quantitative stage (surveys are available upon request). Table 10 below shows the number of people included in the Value Map for each project and with further details, reasoning and justification on the numbers included. The outputs included have been provided and verified by AAT management and each project lead throughout the stakeholder engagement process.

Furthermore, this section of the report will only discuss the well-defined well-being outcomes identified for each project. More outcomes were measured, however, majority of the other outcomes identified are short term and lead to the well-defined outcomes identified, and this is shown in each project Theory of Change. This report will only discuss the long-term social outcomes identified for each project. Although we do include the value created through Co2 reduction, no other environmental outcomes are not included in this evaluation.

Outputs

Table 10: Output Per Project Breakdown

Project	Outputs reported by Awel Aman Tawe				Outputs included in the value map	Justification
	2023	2024	2025	Total		
Hwb y Gors Volunteers	53	49	41	143	53	Risk of overclaiming the number of volunteers - same people volunteering in each year.
Hwb y Gors participants	0	787	581	1,368	200	Risk of double counting number of participants - the same person attending multiple workshops and activities across both years. For our evaluation we will only include a participant once. The Hwb y Gors manager noted during the stakeholder engagement process that Hwb y Gors have around 200 unique participants.
We Are Energy Warriors Schools	2,121	2,635	2,264	7,020	4633	From the outputs given by AAT management, there are 90 schools and over 7,000 pupils supported by the project over the three years in the reporting period. There is a risk of double counting schools in each year and therefore a risk of overclaiming. Some of the schools and pupils are engaging with the project in each reporting year. There are a total of 60 schools unique school that have been supported by the project. (66% of the total schools reported. Therefore, 66% of the total pupils will be included in the value map, which is 4,633 to ensure we do not overclaim.
Taith Community Transport journeys	1,965	3,253	5,401	10,619	600	Reported as number of journeys by AAT management, Taith manager suggested 600 regular clients with a further 250 ad hoc clients during interviews. To ensure we do not overclaim, we will only include the 600 regular clients in the value map.

Energy Advice service	0	26	51	77	77	All 77 clients reported by AAT management will be included in the value map. However, a further 189 'light touch' enquiries were also reported, these will not be included in the value map because any outcomes are likely to be short term, and also to reduce the risk of overclaiming.
Egni	101				50	101 unique sites reported by AAT, however, given the small number of sites engaged with during the limited stakeholder engagement process for Egni, 50 sites will be included in the value map to reduce the risk of overclaiming.

7.1 Hwb y Gors and community outreach outcomes

A focus group session was held at Cwmgors Community Hall with volunteers and participants going through the 10 impact questions of social value. The outcomes considered below were the ones deemed most appropriate for the volunteers and participants, given their feedback in the focus groups and responses to the survey. Once a saturation point was reached and enough confidence was felt that we were measuring the right outcomes, a Theory of Change (TOC) was constructed. This enabled us to understand and demonstrate the journey the volunteers and participants have experienced to reach each well-defined outcome. Please see [Appendix 2](#) for the volunteers' theory of change and please see [Appendix 3](#) for the participants theory of change.

Outcomes for Volunteers

Outcome 1 – Volunteers feel **less isolated and lonely** within the community due to increased opportunities to socialise through their participation in Hwb y Gors workshops and activities



For many people who volunteer at Hwb y Gors, they see this as a way to socialise with others in the community through participating in the workshops and activities. Being able to give their time to Hwb y Gors also means they have more opportunities to participate regularly in activities, and that they are able to look forward to during the week or month, depending on which club they volunteer at. Another benefit is the ability to meet like-minded people and build friendships helping them feel less isolated or lonely.

“Look forward to any future projects /workshops, like the new one coming up (mosaic)” – Volunteer

From the survey result, 86% of volunteers in the sample size who responded now feel less isolated and lonely within the community due to volunteering at Hwb y Gors and community outreach activities and workshops. As 86% of the sample size had experienced positive change, 46 volunteers were included in the value map for this outcome.

Outcome 2 – Through giving their time to Hwb y Gors, volunteers are part of a bigger mission and **feel proud of being able to help others in the community and in protecting the environment**



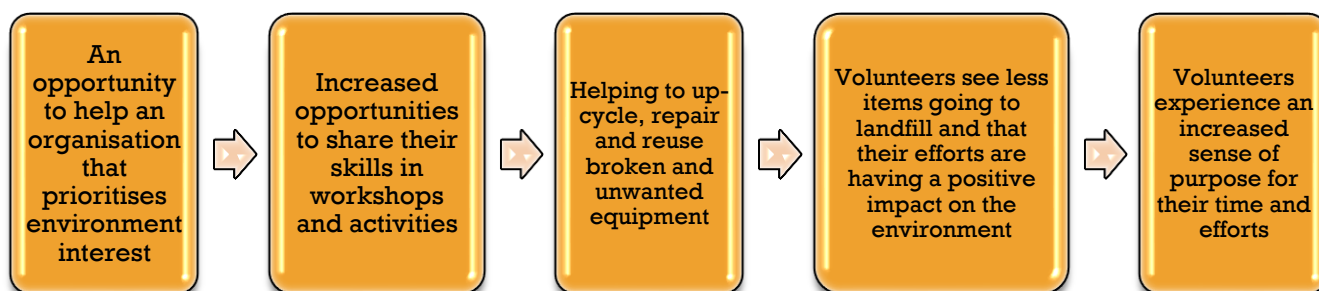
Volunteers describe having something positive to look forward to, opportunities to connect with like-minded people, and feel a part of a broader mission to protect the environment. Volunteers have demonstrated they have pride in their ability to help others and contribute meaningfully to their local community and environment.

“I feel proud being able to give back and help others”

“Being part of AAT gives me a sense of pride.”

Survey results show that 95% of responding volunteers felt proud of their ability to help and support others through their volunteering, therefore, 50 volunteers were included in the value map for this outcome.

Outcome 3 – Volunteers have an **increased sense of purpose** through volunteering efforts



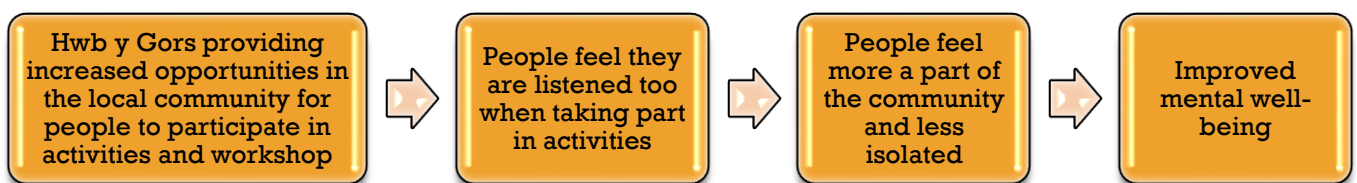
Many volunteers we engaged with mentioned that they have retired, so being able to support their local community through volunteering provides them with renewed purpose, giving them something to look forward to and providing some structure to their week. Volunteering at Hwb y Gors provides individuals with an opportunity to support an organisation focused on environmental sustainability through upcycling, repairing, and reusing broken or unwanted equipment through workshops and activities. Due to their actions, volunteers report seeing fewer items sent to landfill and recognise that their efforts have a positive impact on the environment, leading to volunteers experiencing an increased sense of purpose as a result of their contribution.

*“Being a part of AAT through my volunteering gives me a sense of purpose,
saved my life.”*

The survey results show that 86% of volunteers reported an increased sense of purpose through their volunteering and therefore, 46 volunteers were included in the value map for this outcome.

Outcomes for participants

Outcome 4 - Participants **mental well-being has improved** through attending activities at Hwb y Gors and outreach



Hwb y Gors provides local residents with accessible opportunities to participate in a range of creative activities and workshops that support social connection and community engagement. Through regular involvement, participants report feeling listened to and valued, and these opportunities help to reduce social isolation and foster stronger relationships, contributing to improved mental well-being for those taking part.

"Hwb y Gors is community-centred, and the community is at the heart of their work; the investment they are making is making a real difference to the community"

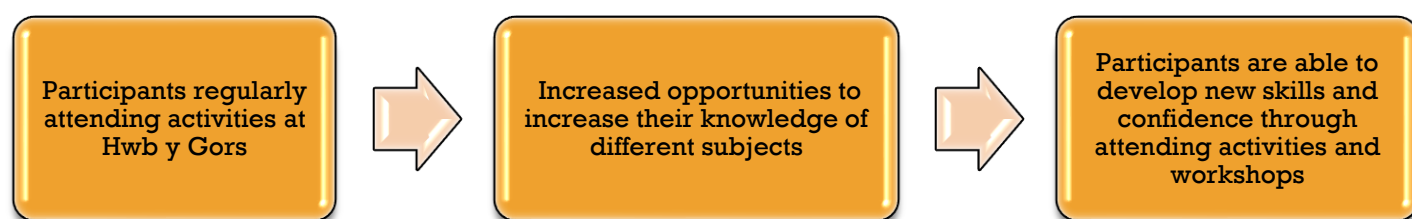
"Now, plenty of activities in the village, I don't have to worry about transport and feeling isolated – alleviates and improves mental health."

"it's great to be able to do what I want, and the activities are high in quality and creativity"

“Nice to have somewhere to go, gives the people meaning and routine”

Survey findings show that 72% of volunteers reported an improvement in their mental wellbeing as a result of volunteering. Based on this positive change, 144 participants were included in the value map for this outcome.

Outcome 5 – Attending activities and workshops at Hwb y Gors means participants have increased opportunities to improve their knowledge about different subjects and **develop their confidence through learning new skills**



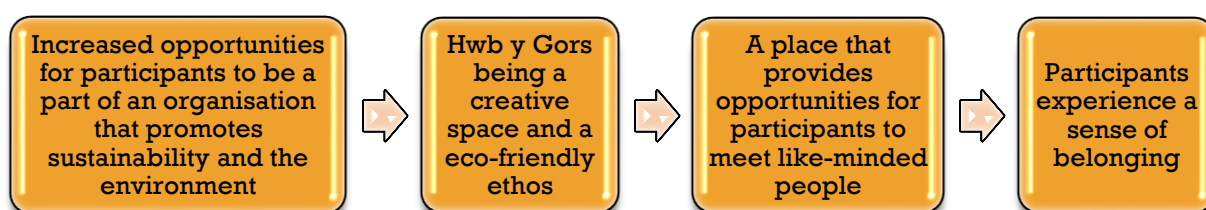
People who regularly take part in activities at Hwb y Gors are given more chances to learn new skills in a friendly and welcoming environment. By attending workshops and activities over time, participants build their knowledge across different subjects and have opportunities to try out new skills at their own pace. This regular involvement helps people feel more comfortable taking part, encourages them to keep learning, and supports personal growth. As a result, many participants report feeling more confident in their abilities and developing new skills and more willing to take part in new activities in the future.

“The best bits are making new friends, being part of a group and learning new skills.”

“having the opportunity to learn new skills within such a nurturing space has been a real joy”

Survey results show that 83% of participants reported they have developed new skills through attending a variety of creative workshops and activities, and therefore 166 participants were included in the value map..

Outcome 6 – Participants have an **increased sense of belonging** through meeting like-minded people by joining an organisation with a strong eco-friendly and environmental vision



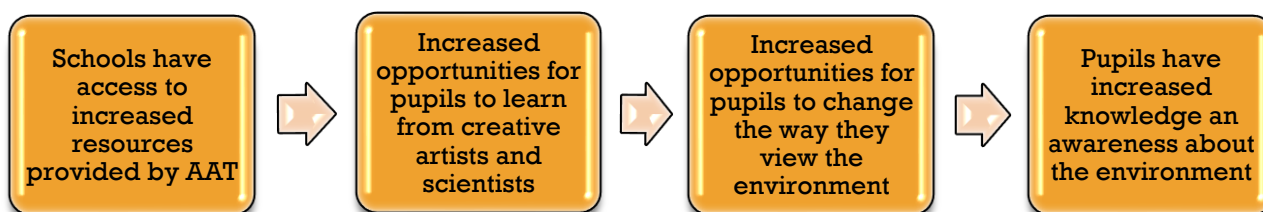
Hwb y Gors provides participants with opportunities to be part of an organisation that actively promotes environmental sustainability and eco-friendly values. As a creative space with a strong environmental ethos, it offers an inclusive and welcoming environment where people can take part in activities that align with their interests and values. Through these shared experiences, participants are able to meet like-minded people, build social connections, and feel part of a wider community. Over time, this regular engagement supports participants to develop a strong sense of belonging within the community.

Survey results show that 83% of participants reported feeling an increased sense of belonging through attending sessions and activities at Hwb y Gors and therefore 166 participants were included in the value map for this outcome.

7.2 We Are Energy Warriors

The We Are Energy Warriors programme delivers environmental education in schools through creative and interactive learning, supported by artists, scientists, and energy data tools through Energy Sparks. Many of the outcomes experienced by pupils through the programme are expected to extend beyond the timeframe of this evaluation. While this analysis identified changes in knowledge, confidence, and behaviour, these outcomes are likely to contribute to longer-term changes that cannot be fully evidenced or valued within the scope of this report. Please see [Appendix 4](#) for the We Are Energy Warriors Theory Of Change.

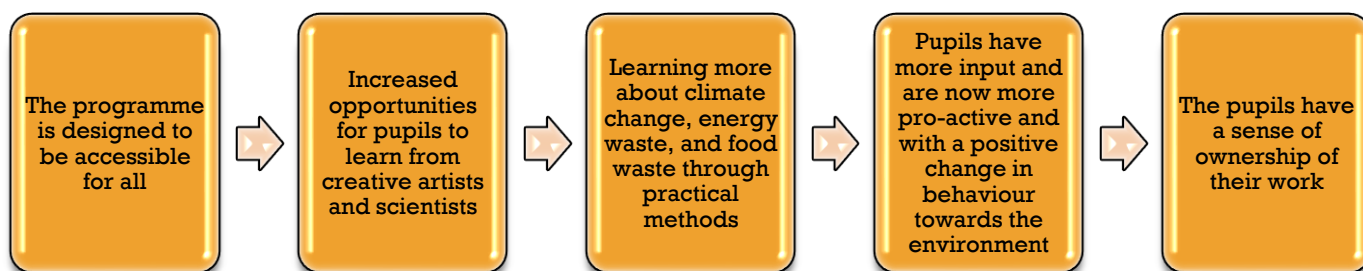
Outcome 7 – The pupils are given opportunities to learn from creative artists and scientists and as a result **have more knowledge and awareness about the environment issues they face**



Through engagement with We Are Energy Warriors, schools gain access to a range of additional resources designed to support environmental learning. These resources create increased opportunities for pupils to learn from creative practitioners, including artists and scientists, in ways that complements the school curriculum. This approach encourages pupils to think differently about environmental issues and challenges, supporting changes in their understanding of the topic. As a result, pupils develop increased knowledge and awareness of the environment, strengthening their understanding of climate change, energy use, and sustainability.

“The activities are very creative and done through expressive arts – this suits the needs of the school and are good way for the children to learn.”

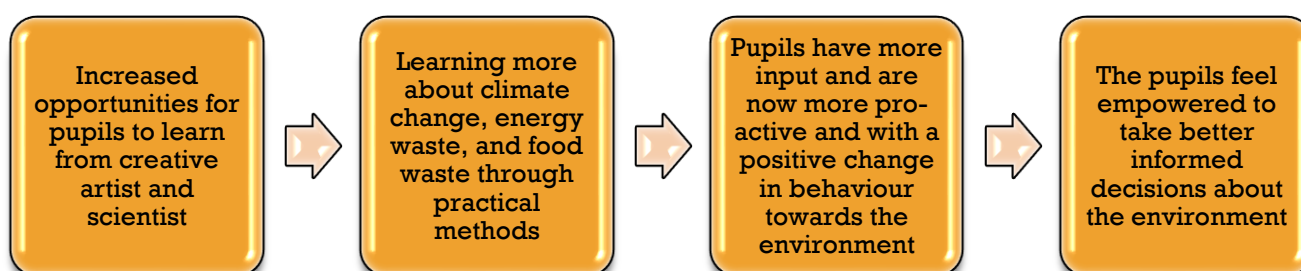
Outcome 8 - The pupils **have a sense of ownership of their work** through taking part in practical lessons



The programme is designed to be accessible to all pupils, ensuring inclusive participation regardless of background or ability. Through delivery of the programme, pupils are provided with increased opportunities to learn from creative practitioners, including artists and scientists, who introduce environmental topics in engaging and practical ways. This hands-on approach supports learning about climate change, energy waste, and food waste, helping pupils to better understand these issues through practical application. As a result, pupils have greater input into their learning, become more proactive, and demonstrate positive changes in behaviour towards the environment. Over time, this leads to pupils developing a strong sense of ownership over their work and increased confidence in their ability to contribute to environmental actions.

“Pupils have a voice and ownership of their work how they can help tackle climate change”

Outcome 9 - The **pupils feel empowered to make better informed decisions** about the environment

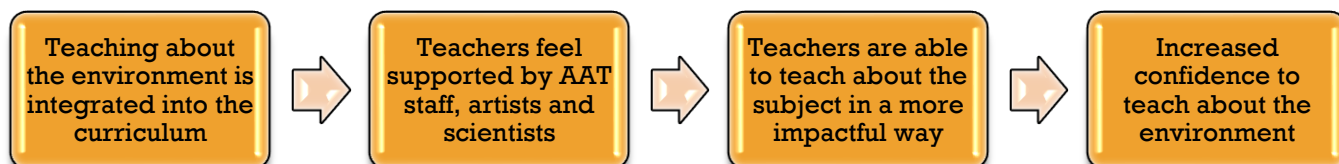


Through the We Are Energy Warriors programme, pupils are provided with increased opportunities to learn from creative practitioners, including artists and scientists, who bring specialist knowledge and alternative perspectives into the learning environment. As pupils gain greater voice and input into their learning, they become more proactive and demonstrate positive changes in behaviour towards the environment. Over time, this leads to pupils feeling empowered to make better-informed decisions about environmental issues and their own role in addressing them.

The children feel empowered because they have a voice and they are being heard

The pupils have given opportunities to learn from creative artists and scientists and as a result have more knowledge and awareness about the environment issues they face, sense of ownership of their work and the pupils feel empowered to take better informed decisions about the environment. From the survey result, 100% of the schools reported that the pupils have more knowledge and awareness about the environment due to the We Are Energy Warriors programme. Therefore 4,633 pupils were included in the value map for this outcome.

Outcome 10 - Teachers feel more **confident to teach about the environment** through the support given by the We Are Energy Warriors programme



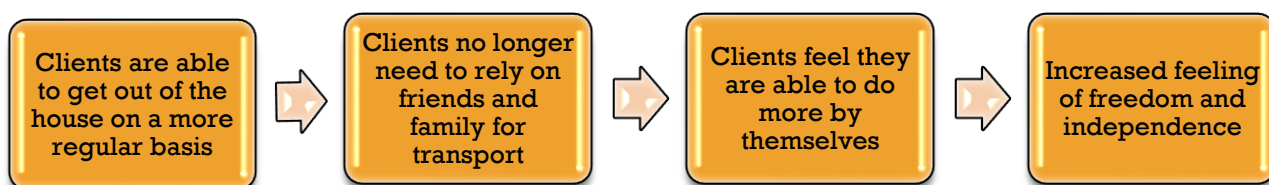
Environmental education is embedded within the school curriculum through the programme, ensuring learning opportunities for both pupils and teachers. Teachers report feeling supported by AAT staff, as well as by artists and scientists, who provide specialist knowledge, resources, and collaborative input. This support enables teachers to deliver environmental topics in more engaging and impactful ways within their classrooms. As a result, teachers experience increased confidence in teaching environmental subjects, strengthening the quality and sustainability of environmental education within their schools.

From the survey result, 100% of the schools reported that the teachers are now more confident to teach about the environment due to the support given by the We Are Energy Warriors project, and 60 teachers were included in the Value Map for this outcome.

7.3 Taith Community Transport

Through in-person and phone interviews held with clients, the outcomes considered below were the ones deemed most appropriate for clients given their feedback in the interviews and responses to the survey. Through this stakeholder engagement a Theory of Change was developed. Please see [Appendix 5](#) for Taith Co-op Theory of Change.

Outcome 11 – Clients are able to get out of the house more often and experience **an increased sense of freedom and independence** because they no longer have to rely on friends and family for transport

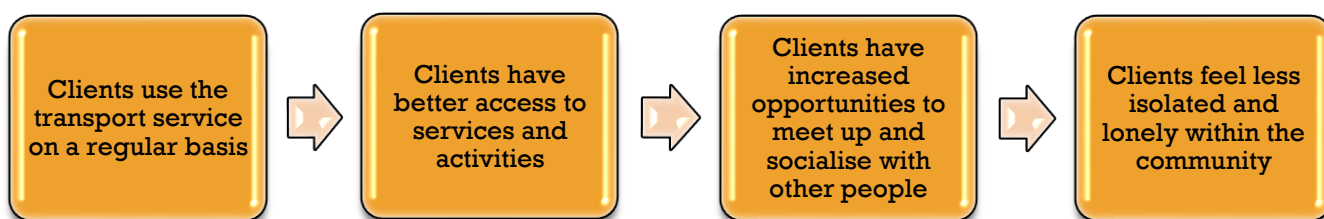


Because of the service provided by Taith Co-op, clients are able to leave their homes more regularly. As a result, they have increased opportunities to access support and services while reducing their reliance on friends and family for transport. This in time, enables them to attend more activities independently, leading to greater confidence in doing things for themselves. Over time, these changes contribute to a stronger overall sense of freedom and independence.

“ the service gives me freedom to do what I want without relying on my family”

From the survey result, 96% of clients who responded they now feel more independence and have more freedom due to Taith Co-op community transport service and therefore 576 clients were included in the Value Map for this outcome.

Outcome 12 – Clients feel **less lonely and isolated** because they have better access to services and have increased opportunities to socialise with other people

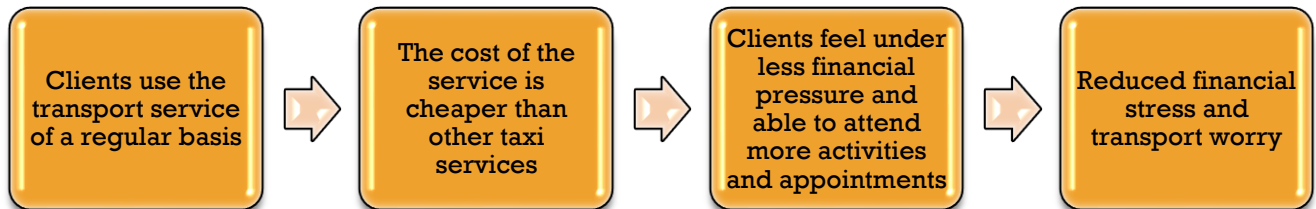


Clients who use the transport service on a regular basis experience improved access to a range of essential services and social activities. This increased accessibility creates more opportunities to meet others and socialise in their community. As a result, clients report reduced feelings of isolation and loneliness, feeling more connected and supported through regular participation in activities and social interactions.

“I am able to go out of the house more, reconnect with friends and it gives me something to look forward to during the week”

From the survey result 92% of clients reported that they now feel less isolated and lonely due to using the transport service on a regular basis, and 552 clients were included in the value map for this outcome.

Outcome 13 – Clients who use the service on a regular basis **feel less stressed and worried about their transport cost** due to Taith Co-op affordability



Clients who use the transport service on a regular basis benefit from a more affordable alternative to other local taxi services. As the cost of the service is lower, clients experience reduced financial pressure, enabling them to attend a wider range of appointments, social activities, and essential services that might otherwise be unaffordable. Over time, this affordability helps to ease ongoing concerns about transport costs, resulting in reduced financial stress and a greater sense of reassurance when planning journeys.

“The service also helps take pressure off the customers on the financial aspect, given that the service is cheaper than other taxi service in the area.” – Project partner

“the cost of the service is great and is a big help” - Client

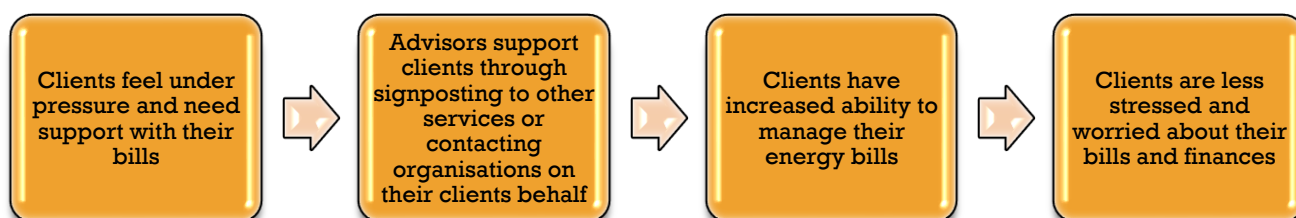
From the survey results 93% of clients reported feeling significantly less stressed and worried about their transport costs due to using Taith Co-op transport. Therefore, 558 clients were included in the Value Map for this outcome.

7.4 Energy Advice Service

Through the stakeholder engagement process, the outcomes considered below were the ones deemed most appropriate for the Energy Advice Service clients given their feedback in the interviews and responses to the survey. Please see [Appendix 6](#) for the Energy Advice Service Theory of Change.

Outcomes

Outcome 14 – Clients are **less worried and stressed about their energy bills** due to the support and guidance provided by the energy advisors

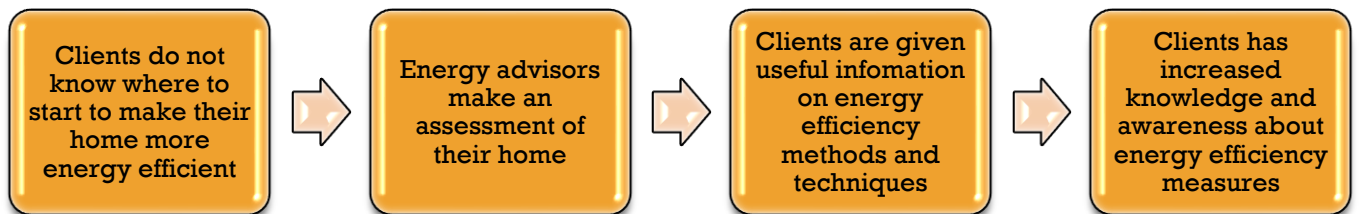


Many clients contact the Energy Advice Service because they are worried about their energy bills and feel under pressure. Advisors support people by helping them contact energy companies or by pointing them towards other services that can help. This support makes it easier for clients to understand and manage their energy bills. As a result, many clients feel less stressed and worried about their bills and their overall finances.

“ I have been able to get on top of my energy bills”

From the survey result, 58% clients reported that they are now less worried and stressed about their energy bills because of the support given by the energy advisors and 45 clients were included in the Value Map for this outcome.

Outcome 15 - Clients have more **knowledge and awareness of energy efficiency measures they can take to make their homes** more energy efficient due to advice and guidance given by the energy advisors



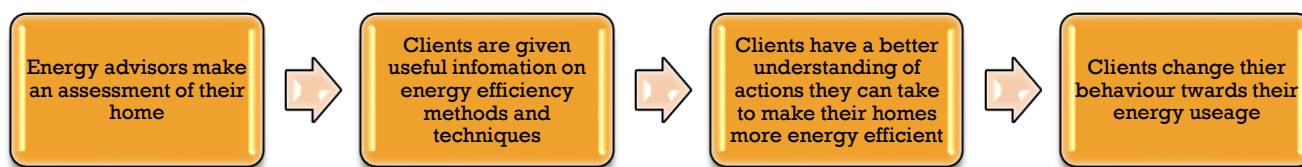
Many clients are unsure where to start when trying to make their homes more energy efficient. Energy advisors support clients by carrying out an assessment of their home and providing clear, practical information about energy-saving measures and techniques. This helps clients better understand the options available to them and what actions they can take. As a result, clients report increased knowledge and awareness of energy efficiency measures.

“Fantastic service. Super approachable and friendly. They explain everything in layman’s terms, as it can all be so confusing. I don’t know where I’d be without them. Big thank you to Lucy and Kerry.”

“They are a friendly team and talked me through step by step what to expect from a home energy visit”

From the survey result 67% clients reported they now have more knowledge and awareness about energy efficiency measures after speaking with the energy advisors, therefore 52 clients were included in the Value Map for this outcome.

Outcome 16 – Clients are **thinking differently about their energy usage and have changed their behaviour** because of recommendations the energy advisors made in their assessment



Energy advisors assess clients' homes and provide practical advice on improving energy efficiency, helping clients understand how to reduce energy use and encouraging positive changes in household energy behaviour.

"The advice and recommendations given by Kerry has meant we now do things different around the house, using less energy than we need to"

"I used to use the tumbler all the time to dry the washing, however, now I think twice, and put washing on the line when I can."

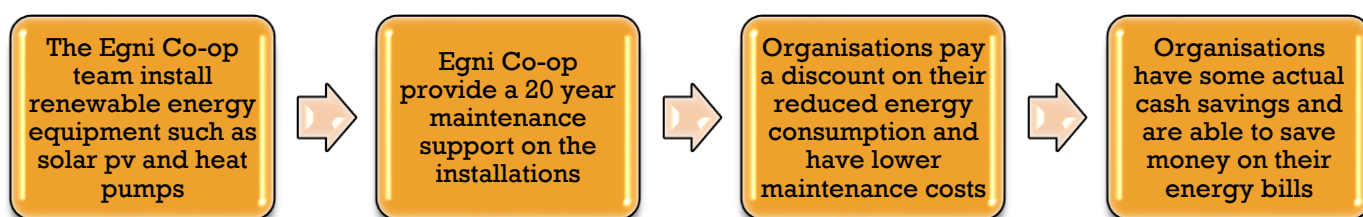
From the survey result 54% clients reported they have changed their behaviour towards their energy usage due to the support and guidance given by the energy advisors and 42 clients were included in the value map for this outcome.

7.5 Egni Co-op clients

Through online interviews held with Egni Co-op clients, the outcomes considered below were the ones deemed most appropriate for clients given their feedback in the interviews and responses to the survey. Please see [appendix 7](#) for Egni Co-op theory of change.

Outcomes

Outcome 17 – **Organisations are able to reduce their carbon footprint save money on their energy bills** through implementation of renewable energy equipment

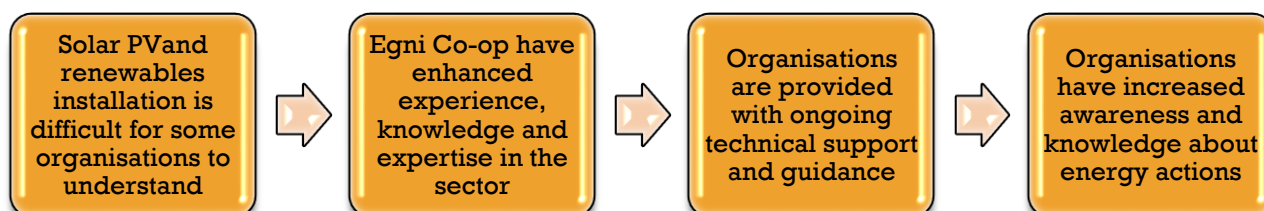


The Egni Co-op team install renewable energy, such as solar panels in schools, community buildings, and other businesses such as Pullmaflex Ltd in Ammanford and Pontypridd Precision Engineering Ltd. They also provide long-term maintenance support for the installations, giving organisations confidence that the systems will continue to work well over time. By generating renewable energy and benefiting from lower running and maintenance costs, organisations are able to reduce their energy bills. As a result, many organisations are able to save money on their energy costs.

“As a business we have a commitment to clean energy, and we have been able to save money on energy bills”

From the survey result, 94% of clients reported they have been able to save money on their energy bills after installing renewable energy through Egni Co-op and 47 clients / sites were included in the Value Map for this outcome.

Outcome 18 – Organisations have increased opportunities to gain **more knowledge and awareness of energy measures** by engaging with the Egni Co-op team

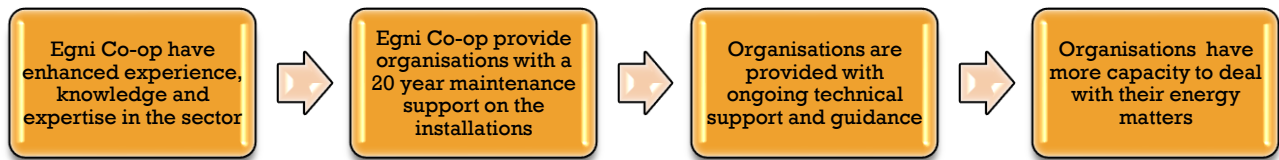


For many organisations, the renewables sector can be difficult to understand. The technical systems involved, funding options, and long-term commitments can feel complex, making it hard to know where to start or whether the right decisions are being made. This uncertainty can prevent organisations from taking action to improve their energy generation. Support from experienced community energy providers helps organisations navigate these challenges, understand their options more clearly, and feel confident about taking practical steps to reduce energy use and costs.

“The Egni team is always very professional and always tailor their information and advice to the audience. They have been particularly helpful to us as an organisation and to our individual officers amongst whom there is little expertise, knowledge and understanding in this area of work. We consider their work of vital importance to the community as a whole.”

From the survey result, 100% of clients reported they now have more knowledge and awareness on energy measures and actions due to Egni Co-op team expertise and support and therefore 50 clients / sites were included in the value map for this outcome.

Outcome 19 – Organisations have improved opportunities to **increase their capacity to deal with their energy matters** due to ongoing support by the Egni team

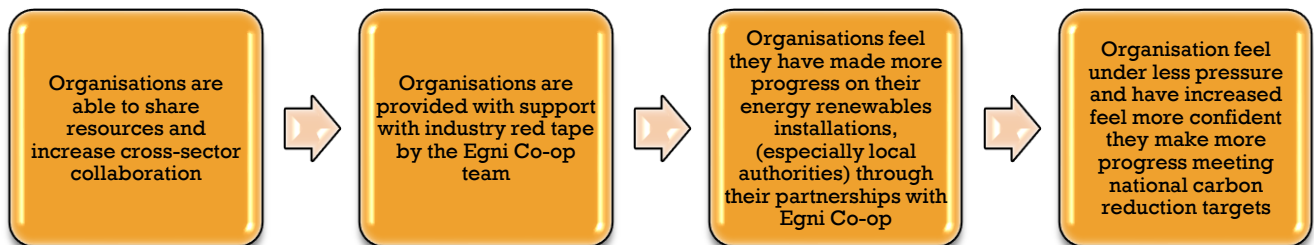


The Egni Co-op team have developed strong experience, knowledge, and expertise in the renewables sector. They support organisations by installing energy systems and providing long-term maintenance support over a 20-year period, ensuring installations continue to operate effectively. Alongside this, organisations receive ongoing technical support and guidance, helping them understand and manage their energy systems with confidence. As a result, organisations build greater capacity to deal with their energy matters and feel more able to manage their energy use over the longer term.

“Primarily due to Egni Co-op experience we have the ability to free up capacity on our energy work”

From the survey result, 94% of clients reported they now have more capacity to manage their energy matters due to Egni Co-op team expertise and support; therefore 47 clients / sites were included in the value map for this outcome.

Outcome 20 – Organisations **have increased confidence their energy renewable actions will help towards meeting national carbon reduction targets**



Through their work with Egni Co-op, organisations are able to share resources and work more closely with other organisations in a collaborative way across different sectors. The Egni team support organisations by helping them deal with industry requirements and managing communication with the National Grid (NGED), which can often feel complex and time-consuming. This support helps organisations make clearer and faster progress with their renewable energy installations, particularly local authorities with larger and more complex projects. As a result, organisations feel under less pressure and more confident that they are making meaningful progress towards meeting national carbon reduction targets.

“We have been able to progress towards net zero targets significantly thanks to the support of Egni cooperative. The ability for Egni to install, manage, monitor systems further frees up capacity within the team and provides peace of mind that the systems are well looked after, maintained, and monitored in safe manner.”

From the survey result, 81% of clients reported they now feel their organisations are more confident that the actions they are taking will help towards meeting national carbon reduction targets, therefore 41 clients / sites were included in the value map for this outcome.

7.6 Areas for improvements

7.6.1. Communication

Stakeholders reported that communication around the opening of Hwb y Gors and its timeline was poorly managed, with insufficient explanation of delays, leading to frustration. Respondents also noted limited advertising of activities, mostly via social media, which meant some people missed information about workshops and events, particularly those who are not active online.

“More advertising in the community”

“More communication about what’s happening with the school”

“Communication of activities could be improved upon, Hwb y Gors mainly use Facebook – can be a barrier for some as they do not use social media”

“There’s a feeling in the community that loads of money is going in and nobody knows what’s going on in the old Cwmgors School”

A few of Egni Co-op clients have also mentioned in interviews and surveys of poor communication and long delays in ongoing support by the Egni team in relation to advice and guidance, and how this is having a negative impact on them,. The feedback was centred around the overall communication of the service provided by Egni team, not on the physical installations and maintenance of the solar panels.

Although clients are given 20-year maintenance of the solar panels guaranteed by Egni Co-op, more work is needed to be done post installation to ensure the clients feel supported on their renewable energy journey.

“I have had no ongoing contact from the organisation at all and when I have sought to contact it has not been easy”

“Ongoing contact and availability is poor”

“more monitoring support services”

7.6.2 Negative impact of increased demand

Taith Co-op is a very busy project with high demand from clients all year round. However, given the success of the project, this has put a strain on hardworking drivers' capacity and workload according to project partners (driver capacity is also a community transport issue in general according to the Community Transport Association²⁰).

“The team seem stretched too thin at times with capacity being an issue given they are a relatively small team”

“The team struggle with capacity”

²⁰ <https://ctauk.org/>

Project leads and drivers have developed strong relationships with clients and often go beyond their capacity to meet transport needs, even when the service is fully booked. While this greatly benefits clients, it creates an unsustainable workload for drivers in the long term.

7.6.3 Concern about fast growth

AAT have a lot of projects currently ongoing, and they have plans for new projects in the near future. The people we engaged with during this report have mentioned that they are worried about AAT's current growth rate and have questioned if it is sustainable longer term.

“There is a risk that AAT is moving away from the original plan of sustainable societies and is trying to do too many different things – Hwb, Taith, a new Pub – without fully thinking things through. It is important to establish firmly first before over-expanding.”

“I am worried about the AAT governance as they continue to grow”

With a relatively small number of staff employed at AAT currently, there is concern from stakeholders that the staff will struggle to keep up with this level of growth from both a practical point of view and from a governance perspective. By adding new projects AAT staff workload and capacity will increase and put further strain on existing projects.

8.0 How do the outcomes relate to the Well-being of Future Generations (Wales) Act?

What is The Well-being of Future of Generations (Wales) Act?

“The Well-being of Future Generations (Wales) Act is about improving the social, economic, environmental, and cultural well-being of Wales. The Act gives a legally binding common purpose – the 7 Well-Being Goals – for national government, local government, local health boards, and other specified public bodies. It details how specified public bodies must work and work together to improve the well-being of Wales. It will make the public bodies listed in the Act 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. This will help to create a Wales that we all want to live in, now and in the future.”²¹

Well-being goals

The diagram below shows how the outcomes identified for AAT’s projects contribute to the well-being goals in Wales. Overall, the image shows how AAT’s work through their community-based projects supports improved wellbeing for individuals, communities, and organisations across south Wales.

- **A Healthier Wales:** Improved mental well-being for participants and reduced isolation for volunteers of Hwb y Gors that support better health outcomes.
- **A More Equal Wales:** Hwb y Gors creative workshops and activities, Taith Co-op and Energy Advice Service reduce barriers for vulnerable groups, promoting equality.

²¹ www.gov.wales

- **A Wales of Cohesive Communities:** Stronger sense of belonging and feeling proud in helping others for Hwb y Gors volunteers promoting a feeling of community cohesion.
- **A Prosperous Wales:** Egni Co-op helps organisations save on energy bills and gain knowledge and awareness, supporting resilience and promoting a reduced or low-carbon economy.
- **A Resilient Wales:** Environmental education through We Are Energy Warriors and renewable energy strengthens climate resilience.
- **A Wales of Vibrant Culture and Thriving Welsh Language:** Creative workshops and arts-based learning promote cultural engagement and identity. Also, Senior staff have learnt Welsh to a high level and actively encourage Welsh learning amongst the staff.
- **A Globally Responsible Wales:** Renewable energy projects ran by AAT reduce carbon emissions, helping towards meeting Welsh Government Net Zero targets .



How Do Awel Aman Tawe Projects Contribute To The Well-Being Goals In Wales



- Increased freedom and independence
- Reduced isolation
- Reduced financial worry



- Increased knowledge and awareness of the environment
- Sense of ownership
- Feel empowered to make better informed decisions



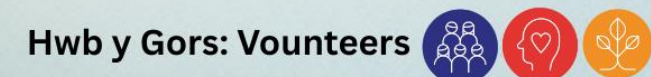
- Improved mental well-being
- Improved skills
- A sense of belonging



- Increased knowledge and awareness
- Increased capacity
- Increased confidence to meet national carbon targets



- Reduced stressed about energy bills
- Increased knowledge and awareness
- Change of behavior towards energy usage



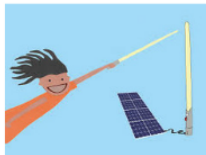
- Reduced isolation
- Feeling proud being able to help others
- Increased sense of purpose



Egni Co-op



Awel Aman Tawe community energy



We Are Energy Warriors

A project by Awel Aman Tawe, Ffynonn Resilience and Child of the Earth, working with Ysgol Cilgerran and Ysgol Eglwysrwr. With funding from WWF.

Project Overview

Energy Warriors worked with two north Pembrokeshire schools to explore the connections between food, energy and climate change. Over ten weeks, pupils learned outdoors through growing, foraging, creativity and hands-on making, developing their understanding of sustainable living and their role in the community.

What The Energy Warrior Did

Pupils took part in sessions with:

- Ffynonn Community Resilience, developing school growing spaces.
- Child of the Earth (COTE) at the Field of Beans and Fruit & Nut sites, planting, weeding and harvesting.
- Artist Sian Lester, learning natural dyeing using foraged plants and donated wool from Curlew Weavers.
- Artist and sculptor Ami Marsden, building miniature "Community Gardens in a Box" using dyed fabrics, recycled and natural materials.

Activities included learning about food miles and food waste, problem-solving games, teamwork, creativity, and sharing learning with others.

Community Gardens in a Box

Pupils designed and built miniature gardens, making everything from bee hives to tiny tools. A treasure hunt for naturally dyed fabric added extra fun and creativity.

Impact on Pupils

- Greater connection to nature and local food.
- Increased awareness of environmental impacts and sustainable choices.
- New creative, practical and teamwork skills.
- Inspired to expand growing activities in school, supported by new volunteers.
- Created banners summarising the messages that mattered most to them.

Impact on Teachers

- Teachers reported that pupils gained memorable hands-on learning experiences linked to the new curriculum.
- Pupils showed increased independence, confidence, and real-life skills in food growing and creative expression.

Impact on the Community

- Community events at Field of Beans and Fruit & Nut showcased pupils' gardens and messages.
- Visitors highlighted the value of community action and sustainable living.
- The exhibition was so well received it was borrowed by other local groups.
- Artists and partners were inspired by pupils' creativity, attention to detail and commitment to sustainability.

9.0 Valuing Outcomes

The difference between using SROI to other frameworks is that it places a monetary value on these outcomes. Using monetisation allows us to not only give the story of what has changed in people's lives but also allows us to put a value on these 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 participants, clients and volunteers.

9.1 Financial proxies

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. Therefore, they were asked to put their outcomes in order of importance and then to rate their importance out of 10. In the qualitative data collection stage, all material stakeholders were also asked to confirm the importance of any changes in the survey. Please see Table 11 below for all the values given to each outcome identified for each stakeholder groups.

The valuations and proxies for the outcomes identified for each stakeholder were taken from Social Value Engine (SVE) and MeasureUp (MU). SVE works alongside and has combined Social Return on Investment (SROI) methodology and the eight Social Value International principles, and the Social Value Engine software has been awarded 'accredited software'

status by Social Value International²². The Social Value Engine relies on robust research and methodologies to ensure the accuracy and reliability of its calculations. Proxy values are derived from credible sources and are regularly reviewed to reflect current economic conditions and social value theory²³. MU is a free valuation framework designed for Social Value and Impact practitioners to measure economic, social, fiscal, and environmental outcomes²⁴. For each material outcome identified for the stakeholders, a proxy has been identified from both SVE and MU and then a judgment has been made which proxy is the most appropriate for the outcomes in terms of financial value and relevance to the outcome, please see [Appendix 8](#) for all possible financial proxies researched and considered.

9.2 Distanced travelled and Anchoring

Once a suitable financial proxy has been identified either through SVE or MU we then utilised the distanced travelled and anchoring method to give a fair financial value for each material outcome identified and reduce the risk of overclaiming.

Distance travelled is defined as the average amount of change experienced by the stakeholder (expressed as a percentage) using quantitative data collected through the surveys. Again, following principle one, we have involved stakeholders as much as possible, as they are the ones best placed to state how much change they have experience, through participating in the various activities and services AAT offer. To calculate the distance travelled, the stakeholders were asked on a 5-point scale how much change they had experienced for each outcome and we used the formula below to gauge the average amount of change in percentage terms;

No change / NA = 0%

²² <https://socialvalueengine.com/about-us-accreditations-and-partnerships/>

²³ <https://socialvalueengine.com/platform>

²⁴ <https://measure-up.org/about-us/>

A little change = 12.5%

Some change = 37.5%

Quite a lot of change = 62.5%

A lot of change = 87.5%

Once the distance travelled percentage had been identified, we then asked on a scale of between 1 – 10 how much they value these outcome. Where 1 is not important and 10 is very important, to understand the relative value of each outcomes. We then used an anchoring technique to calculate the other financial values for each outcomes identified.

We will use Hwb y Gors volunteers outcomes as an example to demonstrate the distance travelled and anchoring approach used. The most appropriate financial proxy found for the volunteers is '£3,400 – the value of regular volunteering' taken from MU²⁵. We then made a judgment and identified the outcome 'increased sense of pride' as the anchor based on both the qualitative and quantitative narrative and data collection. Then, using the distanced travelled formula to calculate the average amount of change, the overall distance travelled was 51%. Therefore, to calculate the value for the outcome, we took the proxy value of £3,400 / distance travelled (51%) giving a total value to be included in the value map for the outcome of £1,743. Finally, to calculate the financial value for the other two outcomes for volunteers, we used the anchoring technique. The average weighting and relative importance stakeholder placed on the outcome 'increased sense of pride' was 5.5 / 10 . For the outcome 'reduced isolation and loneliness' the average weighting was 4.5 /10, therefore, to calculate the relative importance in financial terms we used the following formula; £1,743 (anchor value) / 5.5 x 4.5 = £1,426. Then using the same approach to calculate the value for the outcome 'increased sense of purpose' £1,743 / 5.5 x 5 = £1,584.

²⁵ <https://measure-up.org/mu-outcomes/volunteering/>

We then followed the same approach for each stakeholder group to identify the financial value for each of their material outcomes.

All except for the We Are Energy Warriors pupils outcome, where the TOMs framework where STEM curriculum activities in schools and colleges was used. This has a value of £87.48 for every hour of delivery for each pupils.

In keeping with Principle 6 – transparency, we will make a judgement that each sessions in the schools are delivered for an average 6 hours * £87.48 = £524.88. This is divided by the number of students who have benefitted from the support. This is the value included in the value map.

All the outcomes highlighted in bold in Table 11 below are the anchor outcome identified for each stakeholder group, again following Principle 6 – transparency, judgments were made on the anchor outcome based on qualitative and quantitative narrative and data.

Table 11: Valuing Outcomes

Stakeholder group	Outcomes	Financial Proxy value and source	Distance Travelled	Average Weighting	Value included in value map
Hwb y Gors Volunteers	Reduced isolation and loneliness	£3,400 (MeasureUp – The value of regular volunteering) ²⁶	51%	4.5	£1,426
	Increased sense of pride		51%	5.5	£1,743
	Increased sense of purpose		56%	5.0	£1,584
Hwb y Gors Participants	Improved mental well-being	£9,089 (Social Value Engine – the value of belonging) ²⁷	36%	6.25	£4,171
	Increased opportunities to develop new skills		55%	6.43	£4,291
	Increased sense of belonging		45%	6.10	£4,071
	Increased frustration due to poor communication of the Hwb progress and opening timeframe		45%	5.18	-£4,171

²⁶ <https://measure-up.org/mu-outcomes/volunteering/>

²⁷ <https://www.intelligenthealth.co.uk/gamified-preventative-health-programme-beat-the-street-improves-life-satisfaction-across-communities-evidence-indicates-that-30-of-social-value-is-generated-for-each-1-spent/>

We Are Energy Warriors	The pupils have more knowledge and awareness about the environment, feel a sense of ownership and feel more empowered to make decisions about climate change, food waste, and energy waste.	Value per hour of STEM extra curriculum activity @ £87.48 * 6 hours (TOMs) ²⁸ .	80%	8.33	£1,439
	As a teacher I feel more confident to teach about the environment	£1,799 (Social Value Engine – Value of access to specialist environmental knowledge) ²⁹	76%	8.50	£1,469
Taith Co-op	Increased freedom and independence	£767 (Social Value Engine - Reduced social isolation for community members) ³⁰	79%	7.82	£621
	Reduced isolation and loneliness		79%	7.59	£603
	Reduced stressed about the cost of transport		74%	7.44	£591
Energy Advice Service	I am now less worried and stressed about my energy bills	£1,799 (Social Value Engine – Value of access to specialist environmental knowledge) ³¹	71%	5.69	£1,404

²⁸ [National TOMs Wales Guidance - Part 1 -v3 \(2\).pdf](#)

²⁹ <https://www.findcourses.com/training-supplier/informa-connect/certificate-in-marine-pollution-prevention-management-1666033>

³⁰ <https://www.campaigntoendloneliness.org/wp-content/uploads/cost-of-loneliness-2017.pdf>

³¹ <https://www.findcourses.com/training-supplier/informa-connect/certificate-in-marine-pollution-prevention-management-1666033>

	I now have more knowledge and awareness of energy efficiency measures		71%	6.21	£1,532
	I am now thinking differently about by energy usage		74%	6.14	£1,515
Egni Co-op	We have been able to save money on our energy bills	£1,799 (Social Value Engine – Value of access to specialist environmental knowledge) ³²	46%	6.43	£773
	We now have more knowledge and awareness of renewable energy measures and actions		42%	6.31	£759
	We have more capacity due to ongoing support by the Egni team		47	6.13	£737
	We are confident our renewable energy actions will help towards meeting national carbon reduction targets		51%	6.62	£796

³² <https://www.findcourses.com/training-supplier/informa-connect/certificate-in-marine-pollution-prevention-management-1666033>

9.3 Environmental Impact and Value of Awel Aman Tawe

AAT's management were keen to incorporate environmental outcomes along with their social accounts. Social Value principles considers social, economic and environmental outcomes but always highlights the impact on this on well-being.

AAT's work and projects make a positive contribution to the environment through the generation of clean, renewable energy delivered by both Awel Co-op and Egni Co-op. Table 13 below shows the level of carbon reduction achieved and reported by AAT for each year included in this evaluation. All carbon conversion factors used to calculate reductions in CO₂ are published on GOV.UK.

Table 12 - Carbon Reduction Factors

What are carbon conversion factors?	Carbon conversion factors are standard values used to estimate the amount of greenhouse gases released into the atmosphere from different activities, such as generating electricity, using fuel, or transporting people and goods. They convert activity data (for example, kilowatt hours of electricity generated) into an estimated amount of carbon dioxide equivalent (CO ₂ e), which allows environmental impacts to be measured and compared consistently.
Why do conversion factors change?	Carbon conversion factors are updated regularly by the UK Government to reflect changes in how energy is produced and used across the country. For electricity, this includes changes in the national energy mix, such as increased use of renewable energy and reduced reliance on fossil fuels. As the grid becomes cleaner, the amount of carbon emitted per unit of electricity decreases, even if the same amount of electricity is generated

The carbon reduction savings outlined in table 13 shows 9,237 carbon savings reported by AAT through generation 46,983,275 kWh of clean electricity. The lower carbon savings in 2025 compared with 2023 and 2024 reflects changes in the national electricity grid mix. In 2025, the grid became cleaner due to increased renewable generation and reduced reliance on fossil fuels, which is a long-term objective of community energy organisations such as AAT. As a result, although renewable energy generation levels remained broadly similar, the relative carbon savings attributed to this generation were lower than in previous years.

Table 13 - Value Environmental Impact of Awel Aman Tawe

CO₂ saved per year (tonnes)	2023	2024	2025	Total
	3,245	3,167	2,825	9,237
kWh of clean electricity generated	15,676,049	15,297,981	16,009,245	46,983,275

Using the same approach applied to valuing well-being outcomes, careful consideration was given to identifying an appropriate financial proxy to value the environmental impact created through reduced CO₂ emissions. MeasureUp's social value bank identifies a financial value of £252 per tonne of CO₂, based on evidence drawn from UK Green Building Council (UKGBC) publications.

Therefore, the value created through reduced carbon emissions was calculated as follows (based on figures reported by AAT and shown in Table 13):

2023: 3,245 tonnes × £252 = **£817,740**

2024: 3,167 tonnes × £252 = **£798,084**

2025: 2,825 tonnes × £252 = **£711,900**

Total value included in the value map: 9,237 tonnes × £252 = **£2,327,734**

9.4 Actual cash savings

Table 14 below shows the cash savings as a result of Egni Co-op renewable energy installations. Cash savings due to renewable energy will likely decrease significantly due to decrease in global energy prices.

Table 14: Community Benefit from Egni Co-op (Cash savings)

Community Benefit from Egni Co-op	2023	2024	2025
Onsite savings on electricity bills	£310,026	£256,956	£200,000(Forecast)

10.0 Establishing Impact

To assess the overall value of AAT outcomes it is important to establish how much is specifically a result of the organisation. 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 the 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 of not overclaiming.

Each value discount principle was given a low, medium, and high discount rate, depending on the impact created by others.

Low = 30%

Medium = 60%

High = 90%

10.1 Deadweight

Deadweight allows us to consider what would happen if the service were not available. There is always a possibility that the participants would have received the same outcomes through another activity or by accessing support elsewhere. Table 15 below sets out the deadweight level applied to each stakeholder group, along with the rationale and justification for these assumptions.

Table 15: Deadweight

Stakeholder	Deadweight	Justification
Hwb y Gors volunteers outcomes	30%	During the focus group session with the volunteers many people spoke about the variety of volunteering they do with Hwb y Gors activities. They also volunteer at a few other locations and organisations. The data collected through from the survey gave an average deadweight percentage of 31%. Therefore, a low-level deadweight was deemed appropriate and applied to all outcomes for volunteers
Hwb y Gors participants outcomes	30%	Most focus group participants said they only take part in activities through Hwb y Gors and its outreach. While some also attend activities elsewhere, survey data showed an average deadweight of 27%, which was considered low and applied consistently across all participant outcomes.
We Are Energy Warriors outcomes	60%	Schools involved in the project already delivered some environmental education prior to participation. The We Are Energy Warriors project helped accelerate progress, but some activities would have occurred regardless. Survey data indicated an average deadweight of 40%, so a medium-level deadweight was applied to all outcomes to avoid overclaiming.
Taith Co-op outcomes	30%	When interviewing Taith Co-op clients, many of the discussions held revolved around how the service provided by the drivers was the only reason they were experiencing the outcomes. The data collected through from the survey gave an average deadweight percentage of 26%, therefore, a low-level deadweight was deemed appropriate and applied to all outcomes for the clients.
Energy Advice Service outcomes	30%	Many of the clients mentioned during the stakeholder engagement process that the energy advisors were a strong voice for them, helping them manage with situations and think different about the way they use their energy. Many people also noted that they would have not experienced the outcomes without the 'personal approach' to the service and support given by the energy advisors. From the data collected via the survey, the average deadweight percentage was 28%. Therefore, a low-level deadweight was deemed appropriate and applied to all outcomes for the clients.
Egni Co-op outcomes	30%	Some clients had already been considering renewable energy measures, such as solar PV or heat pumps, but reported that support from Egni Co-op prompted them to act sooner and make greater progress. Survey data showed an average deadweight of 29%, so a low-level deadweight was applied to all outcomes for Egni Co-op clients.

10.2 Attribution

Attribution allows us to recognise the contribution of others towards achieving outcomes. There is always a possibility that others will contribute towards any changes in people's lives, such as family members or other organisations. In the survey, the stakeholders for each project were asked about the attribution of others and were given five options to choose from, and then their responses were given a rating out of 100. For example;

- None of the changes is due to others – 0%
- A few of the changes is due to others – 20%
- Quite a bit of the changes is due to others – 40%
- Much of the changes are due to others – 60%
- All of the changes are due to others – 80%

Table 16 below sets out the attribution level applied to each stakeholder group, along with the rationale and justification for these assumptions.

Table 16: Attribution

Stakeholder group	Attribution	Justification
Hwb y Gors volunteers	60%	During the conversation with the volunteers, some did mention that they volunteer at other locations such as Tairgwaith and the Black Mountain Centre in Upper Brynamman on a regular basis. From the data collected through the surveys, using the formula above, the total level of attribution given was 41%. Therefore, given both the quantitative and qualitative narrative and data, a medium level of attribution was given for material outcomes experienced by the volunteers.
Hwb y Gors participants	30%	Many of the participants mentioned in the stakeholder engagement that they only participate in activities and workshops at Hwb y Gors, and that there are few opportunities to participate in other activities in Cwmgors and the local area. From the data collected via the survey, the average attribution percentage given was 33%. Therefore, a low-level attribution was deemed appropriate for all outcomes experienced by Hwb y Gors participants.

We Are Energy Warriors	30%	Of the schools we interviewed during the stakeholder engagement process, many mentioned that AAT's education officer was the only external support they were utilising when trying to enhance their lessons, teaching and understanding about the environment. The schools also work with local artists and scientists, and some schools have access to Energy Sparks; as part of the We Are Energy Warriors programme. From the data collected via the survey, the average attribution percentage given was 38%, therefore, a low-level attribution was deemed appropriate for all outcomes experienced by We Are Energy Warriors stakeholders.
Taith Co-op	30%	Many of the clients that were interviewed mentioned that Taith Co-op and the drivers were the reason they were experiencing the changes identified. From the data collected via the survey, the average attribution percentage given was 35%, therefore, a low-level attribution was deemed appropriate for all outcomes experienced by Taith Co-op clients.
Energy Advice Service	30%	Some of the clients did mention they did receive support by the Local Area Coordinator (LAC), and the LAC also refers clients to the Energy Advice Service. However, many of the people supported made it clear during interviews that the energy advisors were the main reason they were experiencing the material outcomes identified. Both advisors are viewed as a strong voice and support network for their clients. From the data collected via the survey, the average attribution percentage given was 33%. Therefore, a low-level attribution was deemed appropriate for all outcomes experienced by the Energy Advice Service clients, based on overall narrative in both qualitative and quantitative stages of analysis.
Egni Co-op	30%	Although engagement was low with Egni Co-op community organisation clients, those who we did engage with were clear that Egni were the main reason they experienced the identified material outcomes, who typically approached the clients about installing solar PV. This is also supported by the survey data with an overall 21% attribution level given. Therefore, a low-level attribution was deemed appropriate for all outcomes experienced by Egni Co-op clients.

10.3 Displacement

We need to consider if the outcomes identified in this analysis displaced other outcomes elsewhere. For example, if we deal with criminal activity in one street, have we just moved the problem elsewhere?

For this analysis, there were no displacement factors deemed appropriate based on primary stakeholder engagement and secondary research, therefore 0% was included in the value map for all outcomes for each stakeholder group.

10.4 Duration & Drop-off

Only 2 years of duration were given for Hwb y Gors participants as no data was provided for 2023, therefore we only considered 2024 and 2025 for this analysis. The Energy Advice Service project started in early 2024 and therefore only 2 years of duration is possible given the scope of the analysis. All other projects evaluated were given 3 years of duration as they have been running since at least 2023.

No drop-off has been applied to the outcomes identified for each stakeholder group, as this evaluation covers a three-year period of activities. Stakeholders typically engage with AAT's projects on a regular and ongoing basis, with outcomes experienced consistently over multiple years. Applying a drop-off within the analysis would therefore risk under-valuing the value created through their continued engagement. To test the robustness of this assumption, a 25% drop-off has been applied across all projects and outcomes within the sensitivity analysis.

Energy Advice Service



Awel Aman Tawe
community energy

'M' story

'M', who is retired and over state pension age attended a local Winter Wellness event to see if anyone could help her with advice on heating her home. 'M' lives by herself in a small bungalow and volunteers as a cook at a local community centre, where the event was taking place. During one of her breaks, 'M' came to speak with the Energy Team.

'M' has oil for her heating as there is no supply of gas in her area. She struggles to heat her home as she can't afford the heating bills, her oil tank is near empty. The home feels cold and although 'M' rinses off dishes after use with cold water, she saves washing them properly for a couple of days so she can save putting hot water on to heat to only two or three times a week.

The Energy Team clearly saw that 'M' needed help and so they visited her at home to make an application for a Fuel Heat Fund grant. Whilst the Team were with 'M', they also did a Healthy Homes Healthy People application via Warm Wales for help with small home energy measures.

'M's Fuel Heat Fund application was successful and so she was awarded 500 litres of oil to be sent directly to her from her local oil dealer. 'M' didn't need to do anything, the Fuel Heat Fund organised everything for her.

'M' called the Energy Team to advise that Warm Wales had been in touch with her and offered a choice of a heated throw or an air fryer. 'M' called the Team a couple of days later to let them know that she had received her delivery of oil and she had now put her heating on.

She was very excited to have a warm home with hot water whenever she needed it. 'M' said that she was "tickety-boo!".

11.0 SROI Results

This section of the report presents the overall results of the SROI analysis of AAT. Underpinning these results are the eight SROI principles which have carefully been applied to each area of this analysis. The results demonstrate the positive contribution that AAT makes through the dedication of staff and volunteers, to create positive change in their lives.

Table 17 displays the present value created for each of the included stakeholders who experienced material changes, the breakdown of the figures can be seen in Appendix 1, the Value Map. The present value calculations take account of the 3.5% discount rate as suggested by the Treasury's Green Book for outcomes lasting more than one year. Table 18 shows the social value created by each stakeholder group. The formula used to calculate the final SROI is;

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

Table 17: SROI Headline Results

Total value created	£
Total present value	£7,192,276
Investment value	£4,568,346
Net present value (present value minus investment)	£2,936,883
Social Return on Investment	£1.69

Table 18: Social value created per stakeholder group

Project and stakeholder group	Total social value
Hwb y Gors volunteers	£188,933
Hwb y Gors participants	£1,384,933
Total for Hwb y Gors	£1,573,866
We Are Energy Warriors	£705,567
Taith Co-op	£1,500,192
Energy Advice Service	£200,607
Egni Co-op	£974,542
The value of the impact on the environment (reduced Co2)	£2,327,734

12.0 Sensitivity Analysis

The results demonstrate the highly significant value created by the various projects delivered by AAT and are based on the 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.

If the outcomes were to have one element changed, this would show a difference in the SROI result as seen in Table 17. This adds confidence in the results and in all of the judgments made during this analysis. From the sensitivity analysis in Table 19 below, the social value evaluation can be estimated to be between **£1.43 and up to £1.90** for every £1 invested. The assumptions used in the value map estimate the social value is **£1.69**.

It should be highlighted that Hwb y Gors is now fully up and running, and moving forward it is hoped that the sense of frustration that participants have been feeling about Hwb y Gors will reduce overall. We have tested is variable in the sensitivity analysis, and by removing the outcome '**Increased frustration due to poor communication of the Hwb progress and opening timeframe**' because it is hoped that this is no longer applicable, given the Hwb is now open, it gives a SROI of **£1.82**.

Table 19: Sensitivity Analysis Summary

Factor changed	Revised SROI Ratio	Difference	Variance
Deadweight – reduce all outcomes deadweight level by 10%	£1.85	+£0.16	+9.5%
Deadweight – increase all outcomes deadweight level by 10%	£1.47	-£0.22	-13.0%
Attribution – reduce all outcomes attribution level by 10%	£1.83	£0.14	+8.3%
Attribution – increase all outcomes attribution level by 10%	£1.55	-£0.14	-9.5%
Drop Off – Add a 25% drop off for all outcomes	£1.53	-£0.17	-9.5%
Increase Egni sites – From 50 to 101	£1.74	+£0.05	+3%
Increase number of Hwb y Gors participants – from 200 to 300	£1.85	+£0.16	+9.5%
Reduce number of Hwb y Gors participants – from 200 to 100	£1.53	-£0.17	-9.5%
Remove the outcome 'increased frustration' for Hwb y Gors participants	£1.82	+£0.13	+7.6%
Increased Taith clients - to include additional 250 ad hoc clients	£1.83	+£0.14	+8.2%
Reduce Taith clients – from 600 to 300	£1.52	-£0.17	-10.1%
Increase the number of pupils included for We Are Energy Warriors by 1,000	£1.72	+£0.03	+1.8%
Reduce the number of pupils included for We Are Energy Warriors by 1,000	£1.54	-£0.15	-8.9%
Increase value of all proxies by 25%	£1.90	+£0.21	+12.5%
Reduce value of all proxies by 25%	£1.49	-£0.20	-11.9%
Increase total financial inputs by 10%	£1.43	-£0.27	-15.4%
Reduce total financial inputs by 10%	£1.88	+£0.19	+11.2%

3Reduce the proxy value of the carbon reduction by 25%	£1.55	-£0.14	-8.3%
Increase the proxy value of the carbon reduction by 25%	£1.83	+£0.14	+7%

Taith Community Transport



"Sarah's Story" – Rebuilding Confidence Through Connection

Background

Sarah is a 38-year-old woman with a learning disability and mobility challenges who lives alone in a small village on the edge of Neath Port Talbot. Public transport is extremely limited where she lives, and for several years she struggled to get to medical appointments, day activities or social groups. As a result, her confidence decreased and she became increasingly isolated, often going days without speaking to anyone.

The Barrier

Before joining Taith, Sarah relied heavily on her elderly mother for transport. When her mother needed to stop driving for health reasons, Sarah found herself missing appointments and withdrawing from community life. She wanted to be more independent, but her anxiety around travel and the lack of accessible transport options meant she felt "stuck at home".

How Taith Helped

Sarah's social worker referred her to Taith, and she began by using the service for her weekly learning disability disco. Having accessible transport and a familiar driver made a huge difference.

"I know the driver Mike will come right to my door, help me with the steps, and make sure I'm safe. That means I can actually look forward to going out instead of worrying."

With the support of Taith's drivers and staff, Sarah gradually expanded her journeys. She now attends a weekly social group, visits the local community café, and travels independently to medical appointments with the confidence that Taith will get her there safely and on time.

The Impact

The change in Sarah's wellbeing has been significant:

- She is more confident, sociable, and independent.
- She has reconnected with friends and made new ones at her weekly groups.
- She no longer misses essential health appointments.
- Her family have noticed a "huge positive difference" in her mood and confidence.

————— “ —————
Taith has given me my life back. I feel like myself again.

————— ” —————

Why This Matters

Sarah's story reflects the experience of many adults with learning disabilities in our communities. Without accessible, reliable transport, people become isolated, lose independence, and miss vital opportunities. With it, they thrive. This case highlights the essential role Taith plays in reducing isolation, improving wellbeing, and helping disabled people participate fully in community life.

13.0 Limitations

Overall, the level of engagement throughout the analysis was appropriate, with a sufficient number of participants involved across both the qualitative and quantitative stages. However, table 20 below does discuss and highlight two main limitations of this evaluation.

Table 20: Limitations

Limitations	Reasoning
Egni Co-op stakeholder engagement	There was low level of engagement possible throughout the process of writing the report, which is the main reason we only included 50 Egni Co-op sites in the Value Map, to ensure we avoid the risk of over-claiming the value created. Most of the sites are schools and under the rm and it is very difficult to make contact with the schools. Majority of the stakeholder engagement was conducted between May – September, where these are very busy times for schools and with the school holiday In the middle of the period of engagement. The two energy managers at the local authorities we engaged with were an easier point of contact, and they could peak on behave of the schools in their area. There was good confidence in the outcomes identified, however, this could have been improved upon with further engagement with Egni clients.
Co-op members	We did not include the co-op members as a stakeholder group because more focus were given to individual projects outcomes. Many of the project participants we did engage with are co-op members. Therefore, outcomes were identified for members through various AAT projects.

14.0 Risks

In keeping with the principle 6 – transparency we need to clarify the risks in this report. This forecast SROI is being written with the project is still ongoing. Table 21 explains some risks have been found and then mitigated as best as possible in line with the 8 social value principles.

Table 21: Risks

Risk	Actions taken to reduce the risk
Data collection – Collected quantitative data through both paper and digital surveys. The surveys were distributed by each project lead. There was a potential risk that the stakeholders were choosing the best answers to keep the AAT staff and management pleased with their responses.	All surveys were anonymous with any questions centred around identifying possible characteristics being marked as optional, giving the responder good opportunities to give fair and true feedback. The digital survey were sent back to Social Value Cymru directly, again to keep the responses as anonymous as possible. For Taith Co-op there was a risk that a digital only survey would result in a low response rate. Given the nature of their work and the client they support, many of the surveys were collected on paper with the drivers helping clients fill out the surveys (many of whom have learning difficulties). This was an action that needed to be taken to ensure we had enough quantitative data to support the qualitative findings.
Stakeholder Engagement – low level of engagement with Egni Co-op clients and members of the co-ops.	These have been discussed in the risks section of the report. Given that the stakeholder engagement was low for both these stakeholder groups we had to be careful not to overclaim the value created. For Egni co-op clients we only included 50 of the 101 sites. There was some confidence in the outcomes identified, however, more engagement was needed to reach the saturation point. Unfortunately, this was not possible at this time. Given that we were only able to engage with one co-op member, no material outcomes were identified and therefore they were excluded from this report, again reducing the risk of overclaiming.
Financial Inputs – No official financial accounts for 2025 and forecasting the final two months of the year	The financial accounts included in the report for 2023 & 2024 were audited and verified by Bevan Buckland LLP, Chartered Accountants And Statutory Auditors. Given that the accounts for 2025 have not been verified and audited at the time writing this report, there is a risk that the figures included for 2025 will change. Furthermore, there has also been some forecasting of the inputs for November and December 2025. Caution was taken when examining the 2025 financial accounts and the figures included for the year has been discussed with, and verified by AAT management, to ensure the figures are as accurate as possible.

15.0 Verification process

In keeping with the principles of social value, we also need to ensure we are verifying the information we include in the report. After identifying the material outcomes for each project and stakeholder group, the findings were discussed with each project lead to ensure we captured as much as possible and giving the opportunity to the project leads to challenge some of the findings in the Theory Of Change created. All project leads verified the findings of the stakeholder engagement through the Theory of Change.

We then showed and discussed each Theory Of Change for all stakeholder groups with AAT management and some of the Trustees, again giving them the opportunity to challenge some of the findings. Overall, the project leads, AAT management and board members verified the outcomes identified in the qualitative stakeholder engagement process.

The next verification in the qualitative stage was to collect the data via surveys. Overall, the data supported and showed that the outcomes identified were material for each stakeholder group. Finally, the report was reviewed through an internal process to ensure that the principles and the social value methodology was adhered to and verify the findings and judgments made within the report. A process that is acknowledged by Social Value International, the global governing body for social value through their 'social value management certificate' procedures for good social value and impact management practice by organisations.

16.0 Conclusion and Key Findings

This report has demonstrated that Awel Aman Tawe is forecasted to create over £7,100,000 of value and for each £1 invested, an assumption of £1.69 of value is created.

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

This report has evaluated AAT projects, Hwb y Gors, We Are Energy Warriors, Taith Co-op, Energy Advice Service and Egni Co-op through the Social Return on Investment (SROI) framework and methodology. By following the 8 principles of social value this report can conclude that AAT delivered strong social, environmental, and economic value to communities across South Wales through all their projects between 2023-2025.

For Hwb y Gors, this report identified two key stakeholder groups, participants, and volunteers. Both groups regularly attend creative workshops and activities such as a gardening club, ceramic tiling, repair café, stitch club, and mosaic workshops to name a few.

Through regular participation in activities, volunteers experience positive changes in their lives including feeling less isolated and lonely within the community. Volunteers also feel proud being able to help others within their community and through their volunteering they now feel an increased sense of purpose.

People who live in the local community have taken part in the variety of activities and workshop held at Hwb y Gors and community outreach have felt their mental wellbeing has improved through prolonged participation. They have been able to gain more confidence in the new skills they have developed through the activities and workshops. Finally, participants experience a sense of belonging within the community and feel valued by AAT and Hwb y Gors staff and management.

The We Are Energy Warriors programme is aimed at teaching school children about the environmental challenges we face through practical approach to learning. Schools have reported that their pupils now have increased knowledge and awareness about the environment. This report has also identified that the pupils have a sense of ownership of their environment work, and pupils feel empowered to make better informed decisions about how their actions can affect the environment in the future.

Furthermore, this report has also recognised the impact that the We Are Energy Warriors programme is also giving to the teachers at the schools. They reported feeling of increased confidence to teach about the environment now and in the future. Although this report has analysed 3 years of activities, there is also strong belief from teachers that the outcomes experienced by the pupils will have an impact on them for many more years beyond the reporting period we have evaluated.

The Taith Co-op community transport project serves older and vulnerable people within the community by providing a professional and friendly service. Because of the service, clients have reported they feel they have more freedom and independence and no longer have to rely on friends and family for transport. Taith Co-op clients are now also able to socialise more, through attending activities and meeting up with friends, resulting in them feeling less socially isolated and lonely overall. In addition, due to the cost of the service being cheaper than other local taxi services, clients feel that Taith Co-op is affordable, and they now feel less stressed about their transport costs.

This report has also evaluated AAT's Energy Advice Service impact on the community. The person-centred approach taken by both energy advisors to support their clients have meaningful impacts on the clients. Through support and guidance provided by the energy advisors, clients have noted they have changed their behaviour and thinking towards their energy usage. They now also have a better understanding and increased knowledge and

awareness around energy efficiency measures they can take. In addition to specialist energy advice, the energy advisors also support their clients to better manage their energy bills and helping them out of fuel poverty. Because of the additional support given by the advisors, clients have reported they are now less stressed and worried about their energy bills.

The final AAT project evaluated in this report is Egni Co-op. The Egni Co-op team engage with a variety of stakeholders from National Grid (NGED), local authorities, community organisations, and private sector organisations - by providing organisations with expertise, support, and guidance in renewable energy through the installation of renewable energy equipment such as solar PV, batteries and EV charge points. Due to the installation of renewable energy equipment, clients have reported they have been able to save money on their energy bills and have increased knowledge and awareness of community energy.

Each 'site' in the Egni Co-op portfolio is also given a 20-year agreement to maintain the solar PV and ensure it is operating effectively, which helps organisations with their capacity due to the on-going support. This also helps Egni repay its loans and interest/capital repayments to its members. Finally, through all the work and installations under Egni Co-op, clients and other stakeholders have increased confidence that their actions will help meet their own environmental priorities and Welsh Government Net Zero targets.

Key findings

Hwb y Gors Volunteers

- **86%** of volunteers now feel less isolated and lonely.
- **95%** of volunteers feel proud to be helping others in their community.
- **86%** of volunteers report an increased sense of purpose.
-

Hwb y Gors Participants

- **72%** of participants report improved mental well-being.
- **83%** of participants feel they have developed new skills.
- **83%** of participants experience a stronger sense of belonging.
- **69%** of participants reported frustration with communication around the opening of Hwb y Gors.

We Are Energy Warriors

- **100%** of participating schools report that their pupils now have greater knowledge and awareness of the environment, climate change, food waste, and energy waste.
- **100%** of schools note that pupils have developed a strong sense of ownership over their work, leading to increased interest in environmental issues.
- **100%** of schools say pupils feel more empowered to make informed decisions about the environment.
- Due to the We Are Energy Warriors programme, **100%** of teachers now feel more confident teaching about environmental topics in their schools.

Taith Co-op

- **96%** of clients now feel they have greater freedom and independence.
- **92%** of clients report feeling less isolated and lonely within their community.
- **93%** of clients say they are now less worried and stressed about transport costs.

Energy Advice Service

- **58%** of clients report savings on their energy bills.
- **67%** of clients feel they now have greater knowledge and awareness of energy efficiency measures.
- **54%** of clients report having changed their behaviour towards their energy usage.

Egni Co-op

- **94%** of Egni Co-op clients have been able to save money on their energy bills.
- **100%** of Egni Co-op clients report increased knowledge and awareness of renewable energy measures and actions.
- **94%** of clients say they now have greater capacity to manage their energy matters, thanks to the support provided by the Egni team.
- **100%** of local authorities (who represent 50% of Egni's sites) collaborating with Egni Co-op feel more confident that their renewable energy actions will contribute to meeting national carbon reduction targets.

The key findings highlight many positive outcomes identified and experienced by a range of stakeholders through a variety of projects operating as part of AAT. However, there were some areas of improvement identified, and some recommendations have been made to potentially increase the social value created by AAT moving forward.

17.0 Recommendations

17.1 Data collection

In order to realise how much change and impact the project is having on stakeholders we need data to understand if there is any change, and if so, how much change. We also need to establish if there are differences in the needs of individuals. It is therefore recommended that any continuation of this scheme, needs **investment in the time and finances to ensure suitable systems and processes are in place to measure social value**, extending this to include other important stakeholders. When such data is collected over some time, the potential to use the results 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. Many of the participants or clients have now been supported for a significant period, around 2-3 years on average, with some organisations that are Egni Co-op clients for over 5 years. For any new participants or clients for the current projects, or new projects AAT plan to roll out in the future, it would be possible to gather new baseline data and subsequently review any changes to determine the distance travelled and identify further support needed.

In the data collection process, it is also recommended that AAT consider using other indicators such as self-reported indicators to collect data in the future. For example, The MMPI and the 16 Personality Factor (PF) Questionnaire. This may be a more accurate method when collecting data to measure the amount of change experienced by each stakeholder group(s) in the future.

17.2 Communication

Throughout the process of this analysis, all stakeholders we have engaged with in both qualitative and quantitative stages have mentioned that communication methods and channels that AAT use in relation to Hwb y Gors project timeline & activities and Egni Co-op, overall, as a project are currently not satisfactory.

This report has identified an unintended negative outcome experienced by Hwb y Gors participants feeling frustrated with the lack of communication in relation to the opening on Hwb y Gors. Although some of the reasoning behind the delayed opening are due to external factors that are beyond the control AAT management, it is recommended that Hwb y Gors management and staff review their current communication channels to ensure their stakeholders have a better understanding of what is going on at Hwb y Gors and when. Perhaps with improved communications, participants in particular will feel less frustrated moving forward, especially now that Hwb y Gors is open and that AAT have big plans for the Hwb's future.

In addition, Egni Co-op has experienced significant growth over the past few years, however, their communications with current clients and sites need to be improved upon, based on feedback provided throughout the stakeholder engagement process. When asked in the survey *'Is there anything that you would like to see being done differently or/and what could be better by the Egni team?'* much of the responses mentioned how they would like improved communication, or that they have reached out to the Egni Co-op team, however, have not been able to receive ongoing support. Therefore, it is recommended the Egni Co-op project team reassess their communication methods moving forward to improve the experience for their clients and sites.

17.3 Taith Co-op capacity

This report has identified that the Taith Co-op project and service delivers positive social value and impact for their clients due to the hard work of the project lead and drivers. This is one of the reasons why the project has been successful since its launch. However, this report has also highlighted that there is some concern from the project partners that Taith Co-op team members are working beyond their capacity due to their efforts to keep up with demand. Therefore, it's recommended that additional resources be given to the project to ensure that drivers are able to keep up with high demand for the service without the need for them to work beyond their capacity. Alternatively, if funding is not available to support additional driver capacity, consideration needs to be given as to how to reduce staff workload by taking on fewer journeys.

17.4 Future plans

As discussed throughout this report, AAT have a lot of projects ongoing at present, and overall, all projects have been reported as having a positive social impact on the stakeholders, as shown through this evaluation. However, as we have also mentioned there are some areas for improvement presently to possibly enhance the experience of the stakeholders. Therefore, AAT management should take this into consideration when delivering plans for future projects.

AAT have grown significantly over recent years to run multiple projects that benefit their stakeholders and the local community. During the interviews and focus groups held throughout the months of the stakeholder engagement process, stakeholders we spoke with mentioned that they are wary of AAT's current growth rate. The number of projects ran by the organisation currently, and any future project plans and how this will have an impact on organisational governance and the capacity of AAT staff and management. Although for some, the current expansion of AAT projects is seen as entrepreneurial and keeping up with

strong momentum, there is concern from some other stakeholders feel that the current growth may be unsustainable and that AAT may lose sight of their core values as a result of rapid overexpansion.

Therefore, it is recommended that AAT management assess their future growth plans, ensure that they have enough capacity to run all planned projects without having a possible negative impact on current projects, and effectively communicate with their project stakeholders so that they have an improved understanding of that AAT's future direction.

18.0 Appendices

Appendix 1: Value Map (Separate excel document)

[Appendix 2: Hwb y Gors Volunteers Theory Of Change](#)

[Appendix 3: Hwb y Gors Participants Theory Of Change](#)

[Appendix 4: We Are Energy Warriors Theory of Change](#)

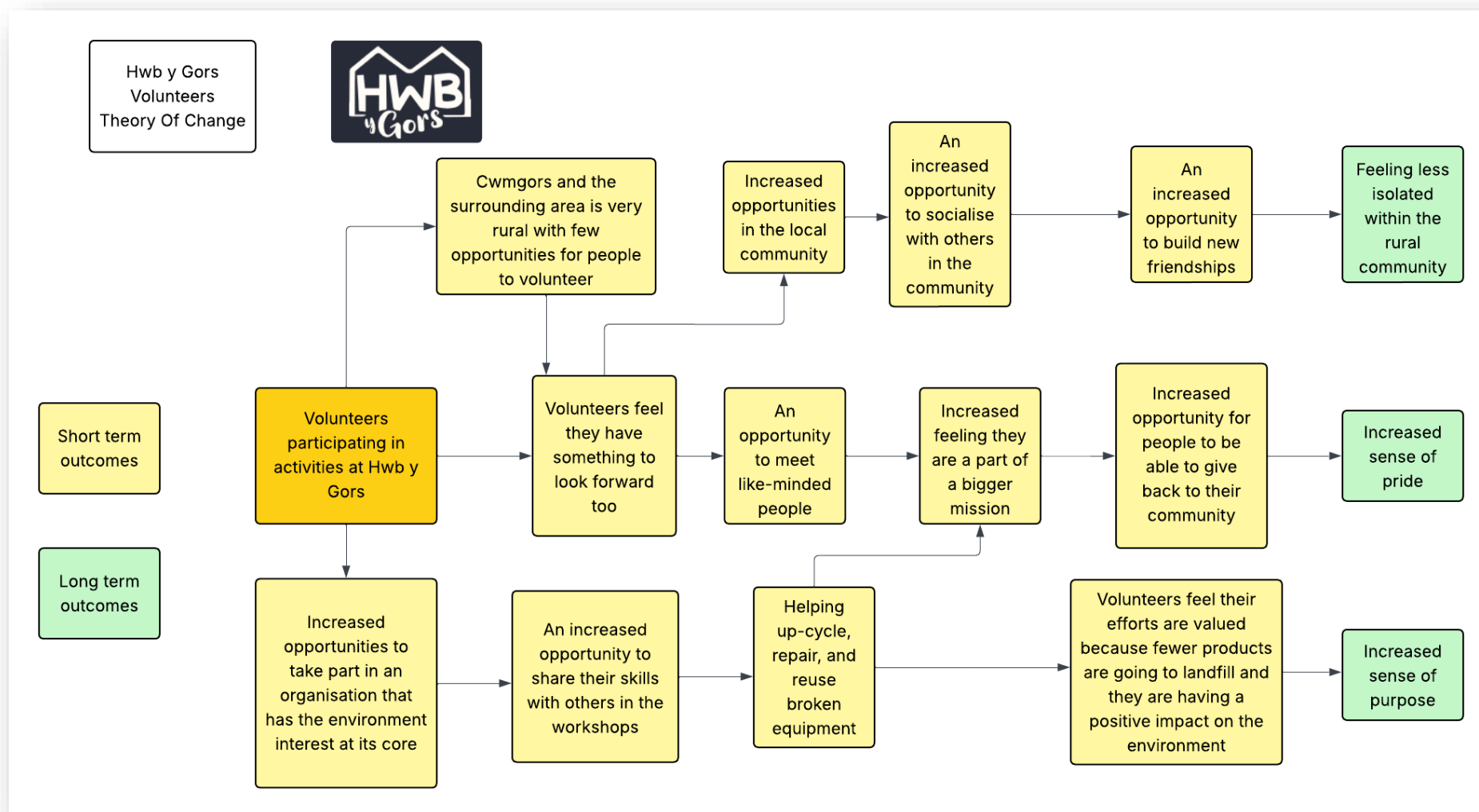
[Appendix 5: Taith Community Transport Theory Of Change](#)

[Appendix 6: Energy Advice Service Theory of Change](#)

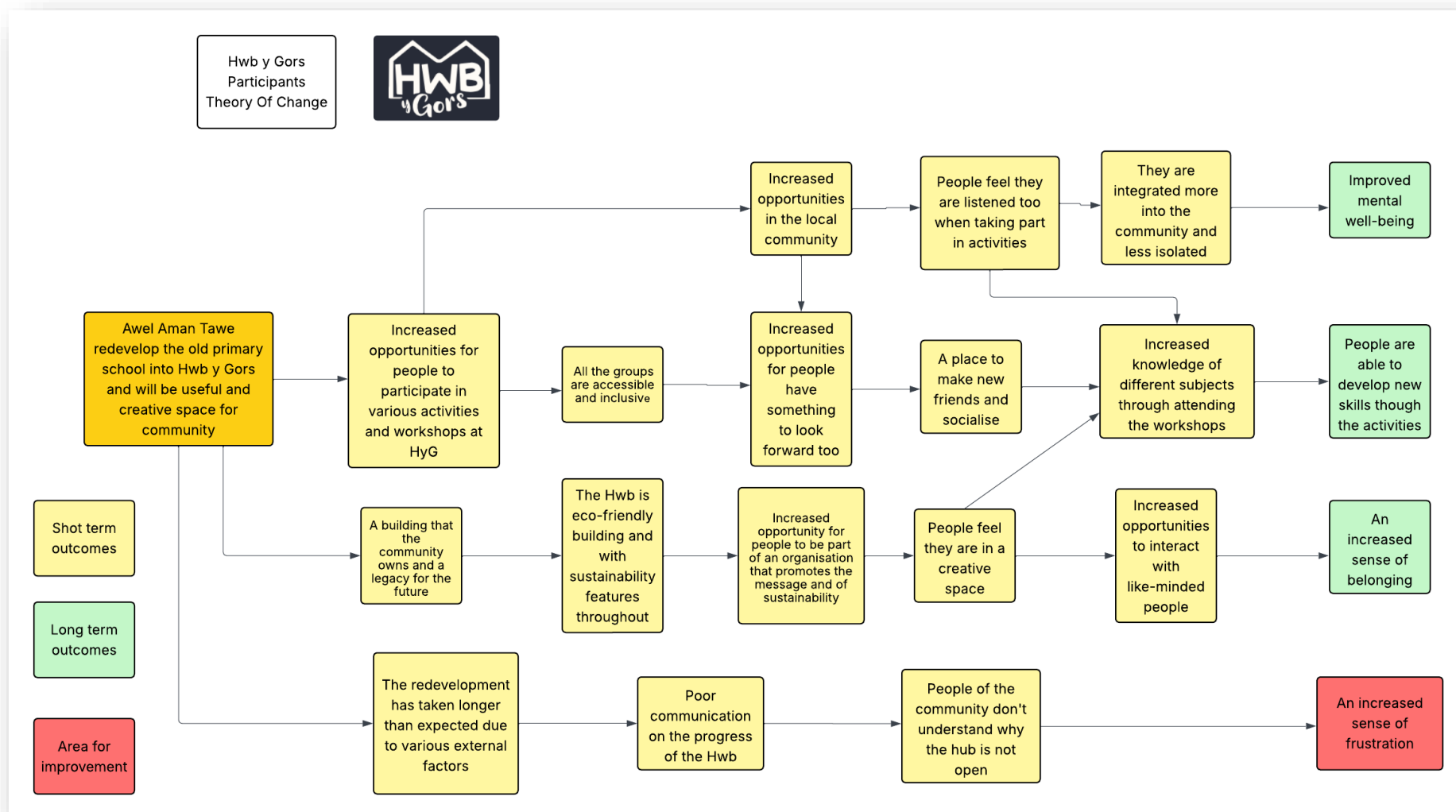
[Appendix 7: Egni Co-op Theory of Change](#)

[Appendix 8: Further research around possible financial proxies](#)

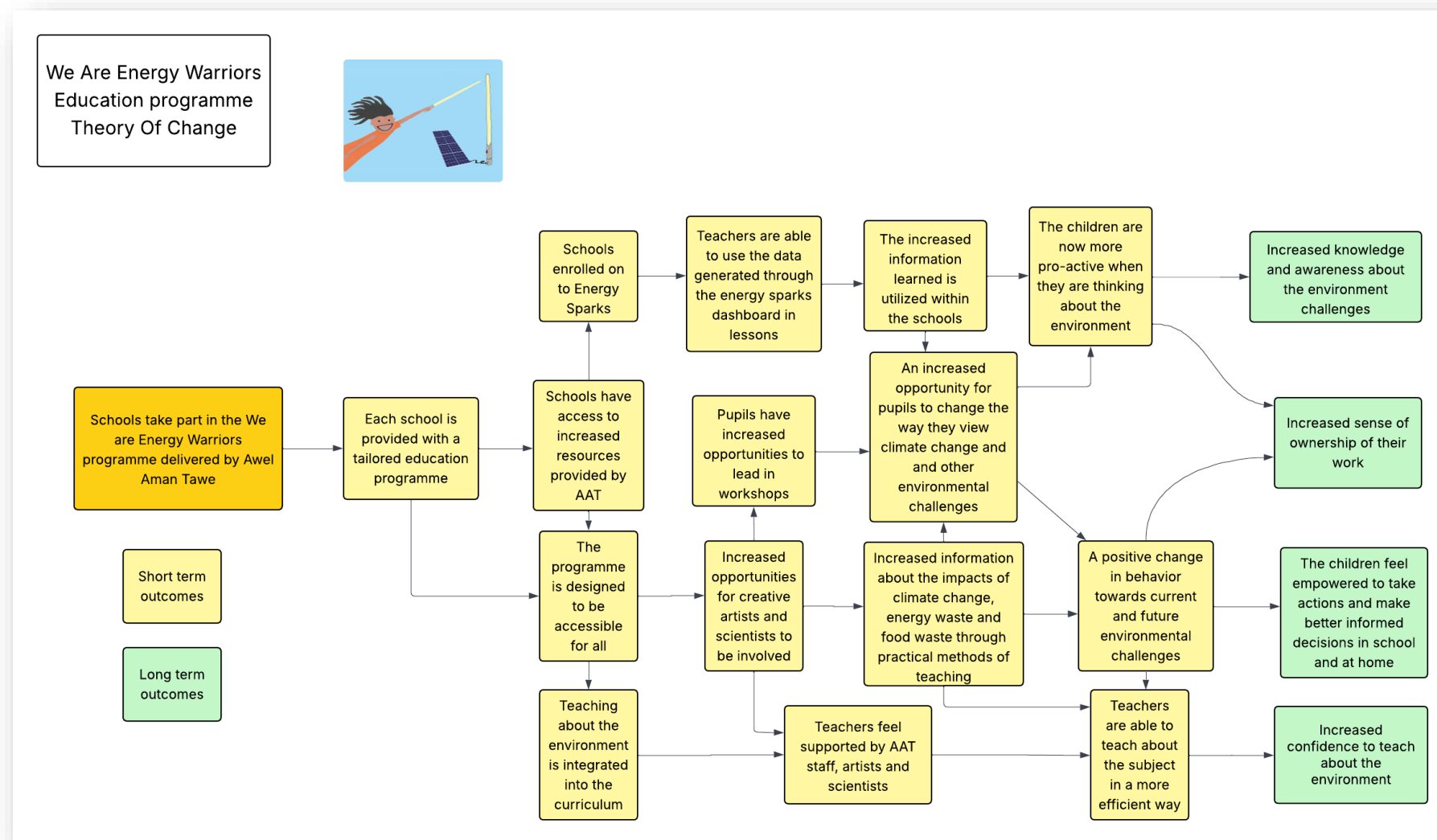
18.1 Appendix 2 - Hwb y Gors Volunteers Theory Of Change



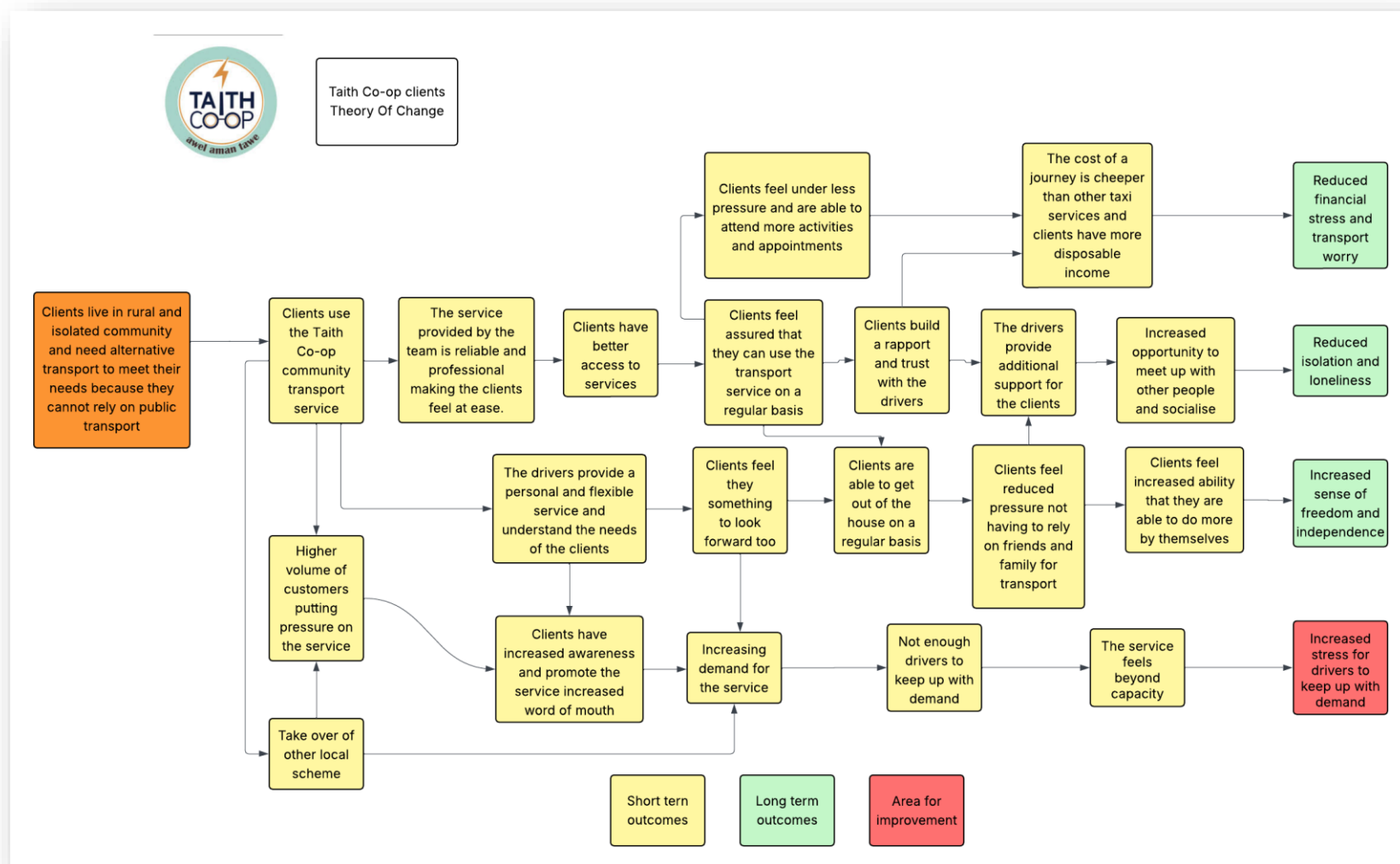
18.2 Appendix 3 - Hwb y Gors Participants Theory Of Change



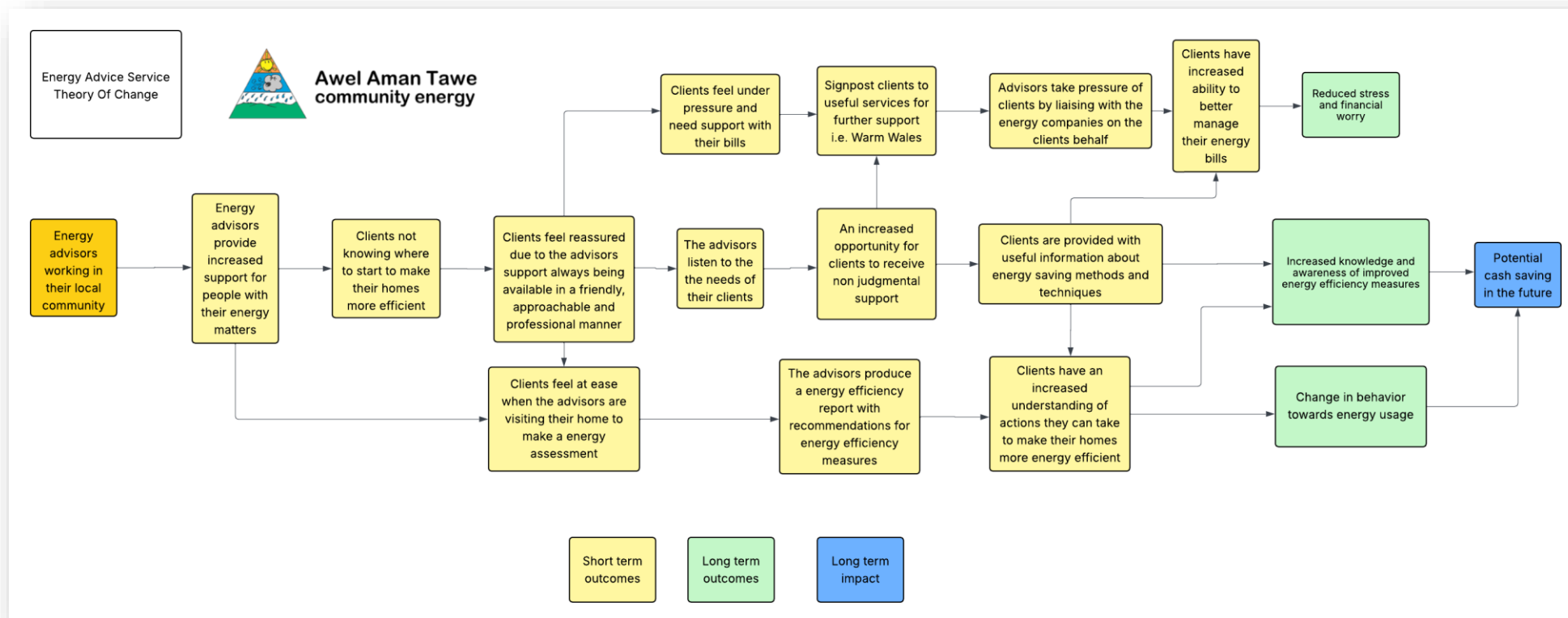
18.3 Appendix 4 – We Are Energy Warriors Theory of Change



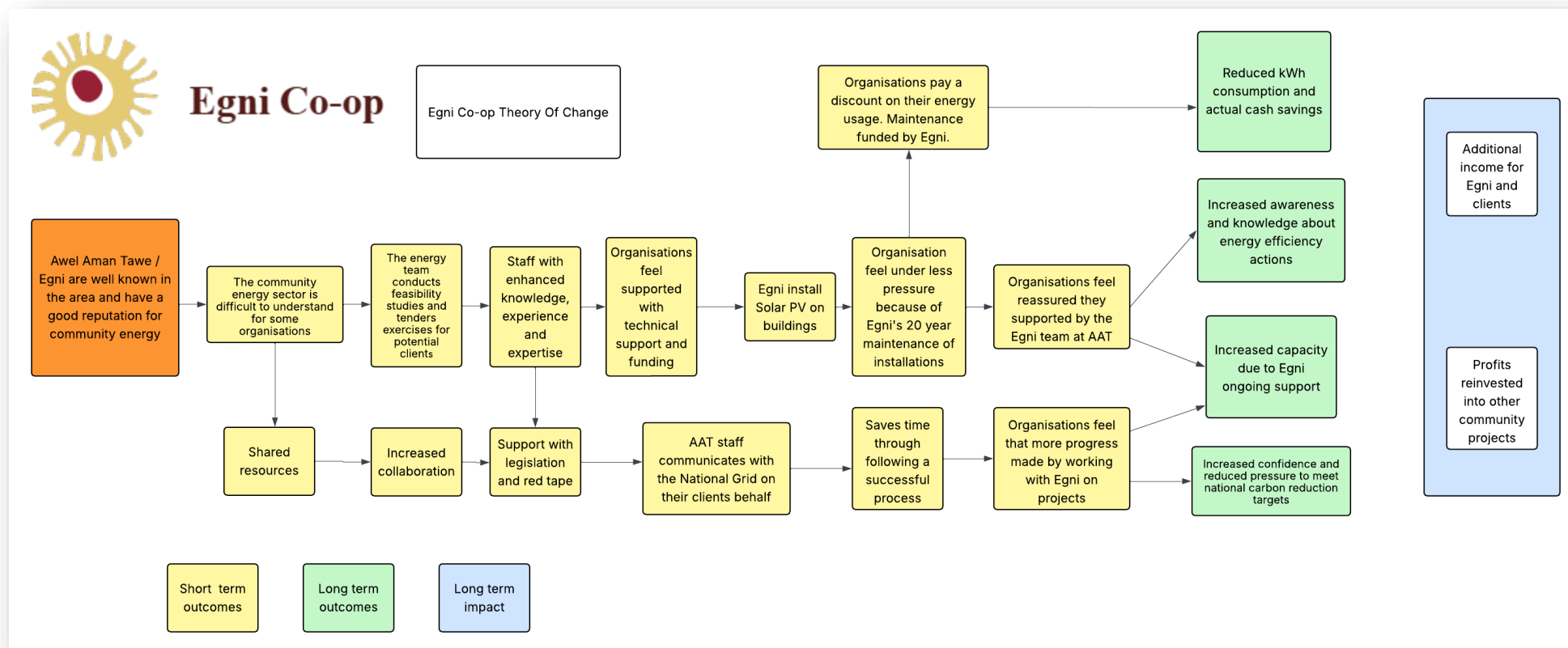
18.4 Appendix 5 - Taith Community Transport Theory Of Change



18.5 Appendix 6 - Energy Advice Service Theory of Change



18.6 Appendix 7 - Egni Co-op Theory of Change



18.7 Appendix 8 – Further research around possible financial proxies

Hwb y Gors volunteers	MeasureUp	Value	Link	Social Value Engine	Value	Link
I feel proud being able to help others in the community	Regular volunteering	£3,400	https://measure-up.org/mu-outcomes/volunteering/	Regular attendance at voluntary or local organisation	£2,034	https://www.tnlcommunityfund.org.uk/media/insights/documents/The-Economics-of-CATs-Power-to-Change.pdf?mtime=20200306143844&focal=none

Hwb y Gors Participants	MeasureUp	Value	Link	Social Value Engine	Value	Link
My mental well-being has improved	Improved mental health	£30,700	https://measure-up.org/mu-outcomes/improved-mental-health/	Value of having good neighbours	£1,090	https://scopeni.nicva.org/article/why-good-neighbours-are-worth-their-weight-in-gold
I have a sense of belonging	nothing suitable			Sense of belonging in Scotland (2024)	£9,089.00	https://www.intelligenthealth.co.uk/gamified-preventative-health-programme-beat-the-street-improves-life-satisfaction-across-communities-evidence-indicates-that-30-of-social-value-is-generated-for-each-1-spent/

We Are Energy Warriors	Measure Up	Value	Link	Social Value Engine	Value	Link
The pupils have more knowledge and awareness about the environment, climate change, food waste and energy waste				Access to specialist environmental knowledge	£1,799	https://www.findcourses.com/training-supplier/inform-connect/certificate-in-marine-pollution-prevention-management-1666033
The pupils feel empowered to take better informed decisions about the environment	Improved children wellbeing	15,920	https://measure-up.org/mu-outcomes/improved-life-satisfaction/improved-childrens-wellbeing/			

Taith Community Transport	MeasureUp	Value	Link	Social Value Engine	Value	Link
	I now feel less lonely and isolated			Reduced social isolation for community members (2014)	£2,592	https://social-value-engine.co.uk/calculator/Value%20for%20Money%20Statement%20%E2%80%93%202014.pdf
	Reduced loneliness	£8,100	https://measure-up.org/mu-outcomes/reduced-loneliness/	Reduced social isolation for community members	£16,000	https://images.squarespace-cdn.com/content/v1/5c59d56ef8135a6dfe12c134/dd8de47e-ed6-4072-8e55-e1626688a37c/Where%27s+WELLBY+-+the+big+picture?format=2500w
				Improved access to community facilities and services	£3,798	https://research.senedd.wales/research-articles/how-are-cost-of-living-pressures-affecting-rural-communities/
I now feel less stressed about the cost of my transport				Reduced social isolation for community members	£767	https://www.campaigntoendloneliness.org/wp-content/uploads/cost-of-loneliness-2017.pdf

Energy advisors	MeasureUP	Value	Link	Social Value Engine	Value	Link
I am now less worried and stressed about my energy bills	Improved mental health	£30,700	https://measure-up.org/mu-outcomes/improved-	Value of having good neighbours	£1,090	https://scopeni.nicva.org/article/why-good-neighbours-are-worth-their-weight-in-gold
I now have more knowledge and awareness of energy efficiency measures	Improved life satisfaction	15300		Able to obtain advice locally (HACT)	£1,977	https://www.tnlcommunityfund.org.uk/media/insights/documents/The-Economics-of-CATs-Power-to-Change.pdf?mtime=20200306143844&focal=none

Egni Sites	MeasureUP	Value	Link	Social Value Engine	Value	Link
All outcomes				Access to specialist environmental knowledge	£1,799	https://www.indocourses.com/training-supplier/informaconnect/certificate-in-marine-pollution-prevention-management-
Reduced c02 emissions	A value of £252 per tCO2e or 25.2p per			Value of reduced greenhouse gas emissions per tonne (2024)	£260	https://ukgbc.org/resources/carbon-offsetting-and-pricing-guidance/