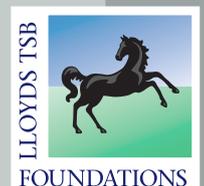


CREATING CHANGE: MEASURING IMPACT REPORT

The Lloyds TSB Foundation for Northern Ireland



The Lloyds TSB Foundation for Northern Ireland is one of four independent Lloyds TSB Foundations, the others being for England & Wales, Scotland and the Channel Islands. The Foundations were established at the time of TSB Group's flotation in 1985 to preserve in a lasting framework the TSB's traditional role of contributing to life in the community.

In January 2009, Lloyds TSB Group acquired HBOS resulting in the enlarged Lloyds Banking Group. Following a far reaching and comprehensive review of the financial and strategic arrangements which underpin our longstanding relationship, a new agreement was reached.

Fixed funding of £1.87 million for the years 2010-2013 was agreed. Annually, this exceeds the average

payment received over the previous three years and the provision of this more stable and sustainable funding arrangement will ensure continued support for the most vulnerable in society.

The independent Board of Trustees, which meets on five occasions throughout the year, agrees on the Foundation's strategic priorities and distributes the funding.

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FOREWORD

The Lloyds TSB Foundation for Northern Ireland designed the Creating Change Programme in response to the sector's needs. Many small charities and community groups had found life quite difficult with the reduction in European funding in recent years and often short term funding is insufficient if organisations are to develop strategically and work towards sustainability. The programme was developed to address these issues.

19 organisations received £1,880,479 over six years commencing in April 2008, which is the first time an independent funding body in Northern Ireland has offered such widespread long term funding to the Voluntary and Community Sector. The organisations have approached the half-way point at three years into the programme and already significant outcomes have been achieved. In order to prove what additional impacts funds from the Foundation are having on participants and their respective organisations, Gauge NI were commissioned in January 2011 to measure a number of key areas of the Foundation's Creating Change Programme. These included Added Value; Financial Leverage; Networking Opportunities; and Community Impact measurements of our core work through this pilot. The methodology of SROI was used as an underlying theme to this analysis, but not all the principles could be used, due to a number of factors including time, resources and research budgetary restrictions.

Through the Creating Change Programme, the Foundation aims to build a strong relationship with the organisations benefiting from this programme, providing financial and non-financial support including training and networking opportunities to enable them to develop and achieve their full potential. It is envisaged that this "Grants-Plus" approach will strengthen and energise the remaining 18 organisations which are in receipt of funding in this pilot programme and that the Foundation's investment will impact positively upon future sustainability for those organisations and the communities they are established to serve. The programme has been attracting local and international interest as funders look to new models of engagement with the organisations they wish to support and develop.

Sandara Kelso-Robb
EXECUTIVE DIRECTOR
The Lloyds TSB Foundation
for Northern Ireland

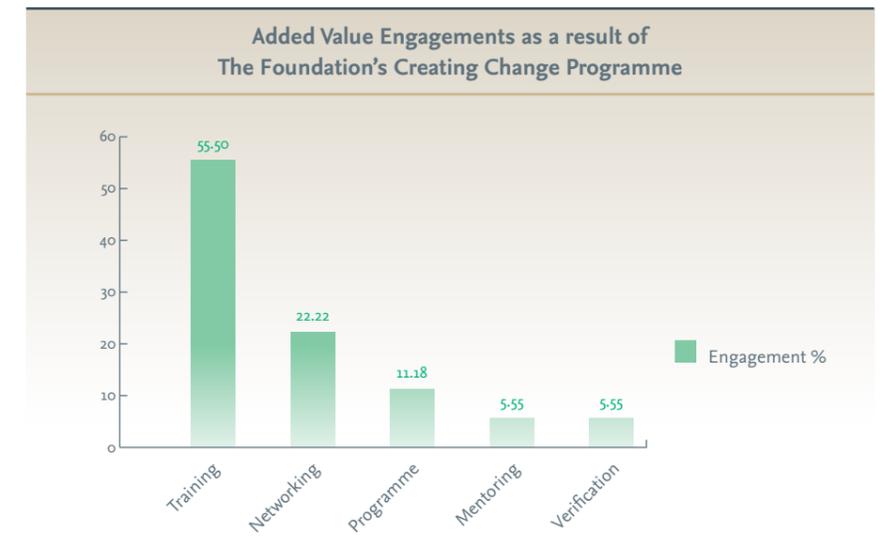
EXECUTIVE SUMMARY

In January 2011, The Lloyds TSB Foundation for Northern Ireland (hereafter 'the Foundation') commissioned Gauge NI (a Belfast based Community Interest Company specialising in impact measurement) to measure the impact of the Foundation's Creating Change Programme. The analysis was carried out at the halfway point (April 2008 – March 2011) of its six year investment and was completed between February and August 2011.

For the Creating Change Programme, the Foundation committed to investing £1,880,479 into 19 organisations over six years, commencing in April 2008. Although outcomes were agreed for each participating organisation prior to programme start, this report was commissioned to look specifically at the unintended / added value that was being reported by groups and which the Foundation felt needed to be captured,

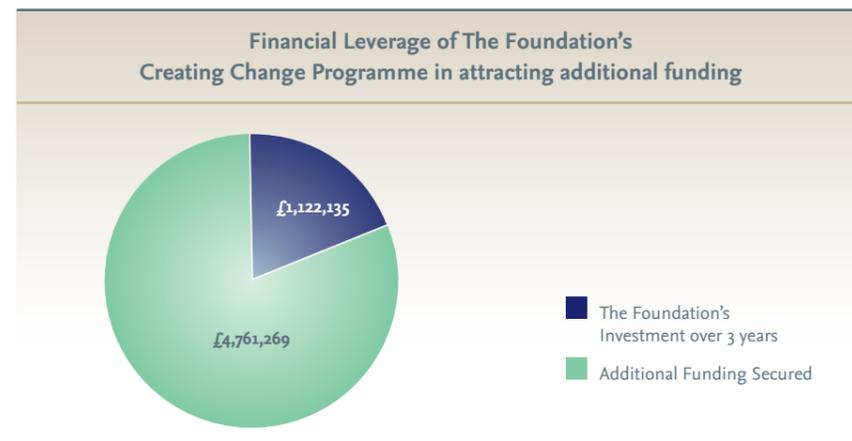
analysed and reported on. It was agreed that this analysis of unintended outcomes would concentrate on four key areas:

- Added Value
- Financial Leverage
- Networking Opportunities
- Community Impact

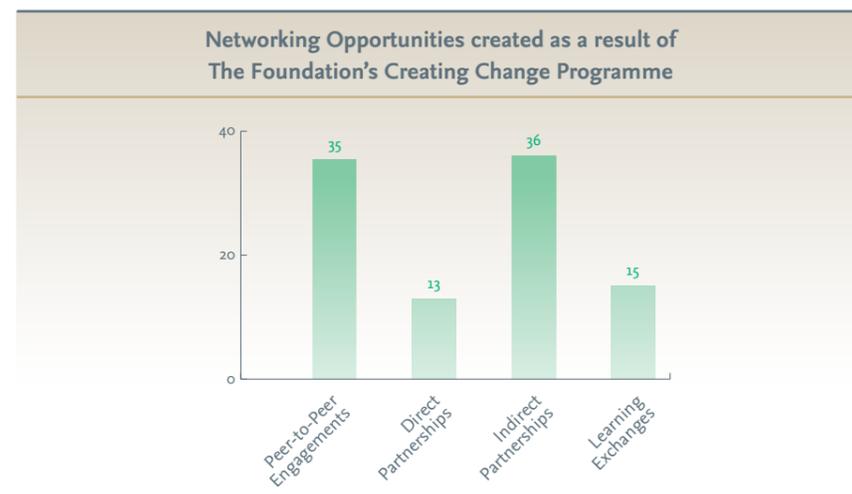


- 1. Added Value** – Each organisation reported a significant amount of additional value as a direct result of being a participant on the Creating Change Programme. Points to note from the results are:
 - Training opportunities provided by The Foundation were ranked as the top added value;
 - Networking opportunities facilitated by The Foundation were ranked by the organisations as the second area of added value;
 - Other areas of added value of the programme included mentoring and verification visits.

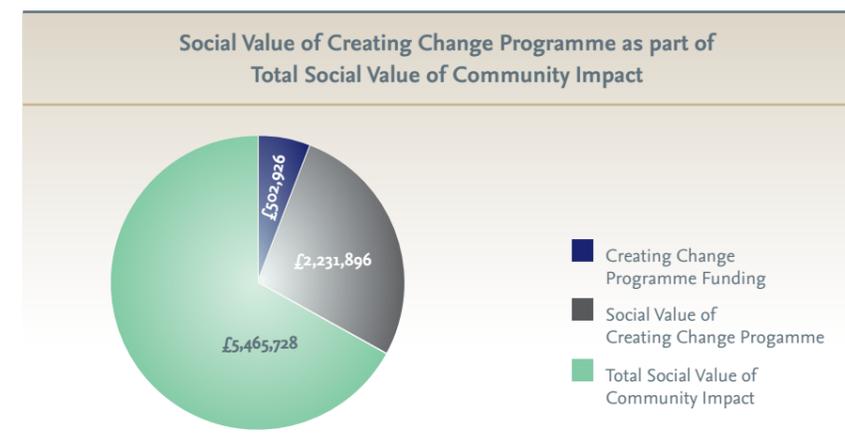
2. Financial Leverage – As a direct result of having secured the funding from the Creating Change Programme, the organisations reported significant success in securing additional funding. This was measured over the three year period. For every £1 invested by the Foundation an additional £4.24 across the 19 organisations was leveraged through additional funding sources.



3. Networking Opportunities – Increasing levels of engagement between the participating organisations were reported. The organisations stated that a particular value of the Creating Change Programme was to be able to talk to similar organisations and share their experiences or learn from others. Some of the organisations were from similar sectors, like the Arts, so the increased forums for communication in the Creating Change Programme were seen as a great source of added value as the graph illustrates below.



4. Community Impact – In communication with each of the organisation's Directors, Senior Managers, staff and volunteers, a key singular stakeholder group was identified. A Social Return on Investment (SROI) methodology was adopted for this stakeholder to identify the impact the investment from the Foundation has made on the community. Whilst the methodology of SROI was not carried out in full, the underlying principles were used to generate the data provided in this report.¹



The social value generated by the Foundation's Creating Change Programme investment as part of the overall community impact and social value created across 18 organisations included:

- Total funding by the Foundation for **Community Impact** alone amounted to **£502,926** over a 3 year period, with the total funding within this period being £1,122,135.
- This investment generated a **social value of £2,231,896;**
- Considering all the funding achieved by the organisations the total amount of **social value realised** amounted to **£5,465,728.**

Recognition must be paid to the current and extensive Monitoring and Evaluation activities undertaken by the Foundation during the course of the programme and is duly acknowledged by Gauge as being robust and valid. This report was commissioned to look at the unintended additional impact of this programme on its participants.

In conclusion, from the first three years of this funding programme it has been proven that both the financial and non-financial investment by the Foundation has enabled the Creating Change Programme to demonstrate true value and entrepreneurial spirit.

¹ The full Social Return on Investment methodology has not been fully applied in the community impact calculations due to a number of factors including time, resources and research budgetary restrictions.

The Foundation has led the way with this “Funding Plus” approach by intervening earlier and investing for longer with key organisations within the Northern Ireland Third Sector. This innovative approach must be welcomed and is in line with current thinking on the subject being discussed elsewhere;

“In part, the growing practice of ‘Funding Plus’ relates to shifts in the method of funding voluntary organisations used by public agencies and a now widespread emphasis on ‘outcomes’, ‘effectiveness’ and ‘performance improvement’.”²

It is evidenced in this report that by leveraging financial investments, coupled with active ‘hands-on’ support in the form of training, networking and mentoring, the Foundation and the organisations participating in the programme have reaped enormous rewards for relatively low risk. In these current times of economic hardship, it is enlightening

that the Foundation’s work is proactive in sowing the investment seeds and helping participant organisations become resilient and thus sustainable.

This helps the organisations on the Creating Change Programme to build upon and sustain their current delivery of services in order to meet the needs of those most vulnerable, marginalised and disadvantaged across communities in Northern Ireland.

Perhaps, the true essence and real value the Foundation brings to the fore through the Creating Change Programme is best summed up from a simple, yet succinct quotation from The Educational Shakespeare Company Ltd (one of the programme participants) when it noted, *“It (the Creating Change Programme) has helped us greatly to be able to have open and honest discussions with The Foundation and to feel that we are supported in more ways than just financially”*.

² Source: Extract from Beyond Money: A Study of Funding Plus in the UK (IVAR, September 2011).

1. CONTEXT AND PURPOSE

1.1 THE LLOYDS TSB FOUNDATION FOR NORTHERN IRELAND

The Lloyds TSB Foundation for Northern Ireland is one of four independent Lloyds TSB Foundations, the others being for England & Wales, Scotland and the Channel Islands. The Foundations were established at the time of TSB Group’s flotation in 1985 to preserve in a lasting framework the TSB’s traditional role of contributing to life in the community.

The Foundation has funded multiple organisations, across all of their programmes throughout Northern Ireland and indeed internationally for the past twenty-five years – an achievement the Trustees and Officers are all rightly very proud of. Whilst supporting a wide range of project-based activities, they continue to believe very strongly in the need to support core costs in order to enable a large number of disadvantaged people to play a much fuller role in their local communities. More recently the Foundation has recognised the need for collaborative and innovative funding to ensure support within these areas also.

1.2 CREATING CHANGE PROGRAMME

Gauge were commissioned in January 2011 to measure the value and impact of the Foundation’s Creating Change Programme designed by the Foundation in response to the sector’s needs. Many small charities and community groups had found life quite difficult with the reduction in European funding in recent years and often short term funding is insufficient if organisations are to develop strategically and work towards

sustainability. The programme was developed to address these key issues.

19 organisations received £1,880,479 over six years commencing in April 2008, which is the first time an independent funding body in Northern Ireland has offered such widespread long term funding to the Voluntary and Community sector. The organisations have approached the halfway point at three years into the programme (April 2008 – March 2011) and already significant outcomes have been achieved. This report was commissioned to subjectively and impartially measure the value and impact of the programme based on the following objectives.

1.3 MEASUREMENT OBJECTIVES

The programme measurement framework would take two key and distinct directions. Firstly, the initial three objectives below would rely on existing secondary data sources from the Foundation’s existing monitoring and evaluation activity supported by primary research methods i.e. questionnaires, interviews, et al. Secondly, the community impact measure would involve a separate methodology called Social Return On Investment (SROI) to capture data from the perspective of the staff/volunteers of the grant supported organisations and also from that of an organisation’s key stakeholder group. SROI is a measurement tool for capturing the social value that organisations create through their services, projects or programmes. It effectively measures outcomes in the eyes of stakeholders and articulates these in a financial form to convey the value and impact of organisations.

In order to achieve these measurable objectives, they were defined as follows:

- 1. Added Value** – the engagements each organisation has benefited from as a result of the Creating Change Programme, and for each organisation to understand what the top 3 added-value engagements have been.
- 2. Financial Leverage** – the amount of other grants or monies levered as a result of being funded by the Foundation.
- 3. Networking Opportunities** – peer-to-peer engagements with other Creating Change organisations, including any consortia/partnerships formed and learning exchange opportunities.
- 4. Community Impact** – measurement of the impact of the organisations work from the perspective of one of its key stakeholder groups, in accordance with Social Return On Investment (SROI) methodology.

1.4 PROGRAMME ORGANISATIONS

Through the Creating Change Programme the Foundation has built strong relationships with the organisations benefiting from this programme, and is keen to support them to develop and achieve their full potential. It is envisaged that this “Grants-Plus” approach will strengthen and energise the remaining 18 organisations in receipt of funding in this pilot programme and that the Foundation’s investment will impact positively upon their future sustainability. Participant organisations indicated the intended outcomes of this funding as follows:

- **Belfast South Community Resources (BSCR)**
To allow them to continue and increase their range of training programmes and community support in the Sandy Row area, Belfast.
- **Citizens Advice Bureau Strabane (CAB Strabane)**
To support a Telephone Advice Worker and allow the increased use of telephone based advice to the largely rural community.
- **Cancer Choices***
To part fund the Development Manager to expand the Volunteer Complementary Therapy service and provide other practical services to those individuals going through cancer treatment and their families.

- **Caring Breaks Ltd**
To part fund the Events/Activities Co-ordinator to expand and diversify the activities available to adults with a learning or physical disability, and to increase the respite offered to their parents and carers.
- **Cathedral Youth Group (Cathedral YG)**
The grant supports the Youth Worker who provides a range of programmes and activities for the young people of the Fountain area.
- **CO3**
To provide support, training and mentoring to Chief Officers in the Third Sector and in particular to those overseeing smaller charities where less internal support is available.
- **Cookstown and District Women’s Group (Cookstown DWG)**
The grant supports salary costs to allow the delivery of a range of training programmes to lone parents, adults with learning disabilities and ex-offenders.
- **Dundonald Family Community Initiative (Dundonald FCI)**
The grant allows additional staff time to develop their work specifically with fathers and their children in the Ballybeen estate.

- **Easilift Community Transport (Easilift CT)**
The lease of an additional minibus is supported by the grant, which enables the group to provide regular transport to those in the Plumbridge and Castledearg areas.
- **ECF Links**
To support the development and expansion of youth activities both within their centre and detached youth outreach work on the streets in Lurgan.
- **Educational Shakespeare Company Ltd (ESC Ltd)**
The grant allows the expansion of work with ex-offenders. This includes training in a range of arts but particularly the medium of film.
- **FAST Rural Transport (Fast RT)**
The elderly and isolated of Irvinestown benefit from the Chit Chat Worker funded through the grant, who calls them each morning to check on their welfare whilst also arranging any transport needs they have.
- **Homestart Antrim**
Homestart Antrim are developing their services in the Ballyclare and Toomebridge areas, providing support to mothers with young children.

- **Kids In Control**
Financial support towards the two full time artistic roles has enabled the organisation to nurture and develop key programmes, securing new, diverse, and innovative projects within their target groups.
- **Kilkeel Parish Bridge Association (Kilkeel PBA)**
The Project Leader’s post is supported by the grant to allow the expansion of their youth activities, in particular their youth outreach and cross-community youth work.
- **Learmount Community Development Group (Learmount CDG)**
To develop and maintain a wide variety of volunteer led services for the rural community of Park and its surrounding area.
- **Newbuildings Community and Environmental Association (Newbuildings CEA)**
The Health Promotion Officer is funded to deliver a range of programmes around health in the community and to train and support Volunteer Health Workers.

- **Off the Streets Community Initiative (Off the Streets)**
The grant supports the Administration Worker to free up development staff to develop the youth services and youth outreach in the Galliagh area.
- **Replay Productions**
The grant supports the post of the Executive Director, who oversees the development of issue specific drama productions which are delivered in schools and community settings.

* It should be noted the Cancer Choices grant ceased in December 2010, only their financial leverage has been taken into account in this report.

2.

OBJECTIVE 1: ADDED VALUE

Definition:

Engagements each organisation has benefited from as a result of the Creating Change Programme, such as training, networking, and mentoring support.

DATA COLLECTION

Each organisation's views on Added Value were collected by means of a questionnaire. See Appendix 7.1 **Creating Change: Measuring Impact Questionnaire.**

2.1 DIRECT & INDIRECT PROGRAMME WORKS

The Foundation's Creating Change Programme of work has been designed to meet the needs of its participant organisations. On occasion, these have been adapted to meet the changing climate for community and voluntary organisations. There exists a mutual appreciation of both the Foundation and the respective organisations, which continues through existing channels of annual evaluations with all parties. A training calendar is agreed for the following year, this ensures the needs of each organisation are met through training needs analysis and that appropriate providers are sought and matched to deliver to the organisations in an engaging and informal setting to maximise learning for all participants.

Through Gauge's analysis we found that programme organisations attributed a real value to the various types of added-value engagements and we have ranked each area respectively, in terms of the value which organisations placed on the programme provision from the Foundation. **Table 2.1 below summarises the findings.**

Training had the highest reported value. It is worth noting that training events whilst meeting direct learning objectives to increase organisations' capacity in a number of areas e.g. Tendering, Financial Scenario Planning, et al also had perceived multiple benefits, including networking and in particular programme organisations valued direct contact with the Foundation's staff.

Table 2.1 Added Value – By Engagement Type/Rank

Engagement by Type / Rank	Organisations (100%)
1. Training	55.5
2. Networking	22.22
3. Programmatic/Indirect	11.18
4. Mentoring	5.55
5. Verification	5.55
Total Responses	18

Whilst the Foundation funds specific work within the organisations, this report aims to capture the added value and additional impacts the Creating Change Programme has had on programme organisations. To emphasise this a number of participant's comments and case studies have been intertwined throughout this report to clearly illustrate the added value elements of the programme in a number of thematic areas:

Creating relationships with the Foundation

"Verification visits from the Foundation's Assistant Director and Grants Officers ensures that stringent monitoring and evaluation processes are in place. It helps us benchmark the progress of Cookstown District & Women's Group. It helps us remain focused with clear measurable objectives for the year ahead".
COOKSTOWN DWG

"Additional members in these target areas was the primary goal of our entire Creating Change grant. These were quite large, remote areas within our operational area where the uptake in our rural Transport Services was very poor. We have slowly achieved a very satisfactory level of membership and service usage in these target areas and continue to develop and grow the service with the support of the Foundation".
EASILIFT CT

Creating new connections with the Programme

"Health Co-ordinator made contact and discussed becoming advisor on Health Steering Group as part of Creating Change Programme. A Community Health advisor from a statutory Agency now offers advice, support, information and funding opportunities".
NEWBUILDINGS CEA

"It helped us to think more laterally about fundraising and employ our creativity to think of other ways to bring in unrestricted monies to the organisation".
ESC LTD

Creating improved communications with the Organisations

"Outlined useful ways of promoting the project and improving marketing and publicity. Helped us consider our internal communications and data use with volunteers, staff, users and donors and shaped some content of new website. It also encouraged us to promote our Facebook page and using it as a means of regularly getting information about events out".
DUNDONALD FCI

"Advice and Support offered by the Foundation's staff through meetings, phone calls and emails in relation to funding spends helped to improve Links systems, procedures and reporting. They gave clarity and developed relationships between the Foundation's staff and Youth Work Manager".
ECF LINKS

Creating better outcomes with the Organisations

"This training provided us with skills required for tendering to gain additional funding for the organisation".
CAB STRABANE

"Changing the mindset of the wider community regarding shared culture. Encouraging parents to engage with young people also looking at a healthier lifestyle".
CATHEDRAL YG

2.2 MENTORING ENGAGEMENTS

Mentoring was a result of all engagement, but specifically mentioned in terms of mentoring with other organisations with a shared purpose on some level. Whilst only accounting for five percent (5.55%) of responses, organisations saw significant value in being introduced to other organisations with a shared ethos. All groups listed networking in general as a result of all engagement but rated the mentoring aspects with both the Foundation and discussions with other organisations on the programme as being one of the most valuable outcomes. This has led to partnerships and joint bids for some organisations, so the impact will last well beyond initial programme investment and is illustrated with some comments below from two participant organisations, in particular.

“On a regular basis Replay and KIC have been able to share information and offer each other advice and guidance. For example KIC was able to offer mentoring support for a major application that Replay was submitting as they had already gone through this experience before”.

REPLAY PRODUCTIONS

“The mentoring from the Foundation’s staff has provided me with confidence for working with funders to find out their needs and express the organisation’s needs”.

CAB STRABANE

2.3 TRAINING PROVISION

Training was reported to be the most valued provision from the Foundation across all 18 organisations as a whole - especially in terms of financial matters. Ultimately, this leads to benefits for the sector; an even greater return on initial investment and potentially longer sustainability of organisation’s programmes and projects across Northern Ireland. As training was identified and ranked as the number one major value added activity, it was agreed that each specific training event should be analysed in terms of their value as perceived by the 18 Creating Change participant organisations (refer to Table 2.2 below). Highest rated engagements have been given greater weighting in arriving at an overall score – Rank 1 given a weight of 3, rank 2 a weight of 2 and rank 3 a weight of 1.

Table 2.2 Training – By Type/Rank

Training Type	Rank 1	Weight	Rank 2	Weight	Rank 3	Weight	Total Score
Income Generation	3	3	1	2	2	1	13
Tendering Training	2	3	2	2	1	1	11
Financial Scenario Planning	1	3	3	2	0	1	9
Communications Training	2	3	0	2	2	1	8
External Training	1	3	2	2	1	1	8
Monitoring/ Reporting	1	3	0	2	1	1	4
Leadership Training	0	3	1	2	0	1	2

The current economic climate clearly has had an impact on the types of training valued. Several organisations mentioned changing their approaches to how they do business as a result of training and external factors in the current funding climate. It is clear that the organisations have valued the learning more around financial competencies needed to ensure ongoing success in challenging times ahead than those associated with programmatic or staff effectiveness. Several groups reported awareness of the need to move to sustainability and consider developing social enterprise models and thus charging for their services. For several groups this was a new concept and one that will take some time to develop whilst other groups had already begun this and valued support in developing their processes.

3. OBJECTIVE 2: FINANCIAL LEVERAGE

Definition:
The amount of other grants or monies levered as a result of being funded by the Foundation.

DATA COLLECTION

This data is collected from the organisations by the Foundation as part of their robust monitoring and evaluation process and formed the basis of the analysis below. In some cases organisations had to be contacted directly to clarify and complete the data set.

Of the £1,122,135 which has been drawn down as of 31st March 2011 this leveraged a total of £4,761,269 during the first three years of the programme at the mid-point. This represents a return of £1: £4.24 i.e. for every pound invested by the Creating Change Programme since inception an additional £4.24 has been leveraged on average during the first three years. Of the 19 organisations, the average annual amount leveraged is £83,531. This contrasts with the annual investment by the

Foundation of approximately £20,000, per organisation.

The figures seem to indicate the additional influence that having a long term source of funding has on other potential funders; organisations consistently cited the Foundation as being influential in their success in accessing these additional funds. See Table 3.1 below for a full breakdown of each organisation across the three year period measured.

Table 3.1 Financial Leverage Analysis (Years 1 – 3, 2008 – 2011).

Organisation	Year 1	Year 2	Year 3	Total £
Belfast South Community Resources	743,000	25,000	270,000	1,038,000
CAB Strabane	0	182,469	72,021	254,490
Cancer Choices	0	501,500	0	501,500
Caring Breaks Ltd	0	899,000	0	899,000
Cathedral Youth Group	8,953	48,555	53,087	110,595
CO3	65,000	51,600	21,000	137,600
Cookstown District Women’s Group	0	99,714	32,127	131,841
Dundonald Family Community Initiative	5,000	25,000	27,000	57,000
Easilift Community Transport	2,000	2,000	2,000	6,000
ECF Links	60,000	287,764	0	347,764
Educational Shakespeare Company Ltd	0	7,200	135,700	142,900
Fast Rural Transport	0	2,000	0	2,000
Homestart Antrim	6,133	8,200	11,693	26,026
Kids in Control	0	34,700	38,490	73,190
Kilkeel Parish Bridge Association	0	126,150	44,000	170,150
Learmount Community Development Group	3,000	0	1,000	4,000
Newbuildings Community and Environmental Association	60,000	24,028	18,850	102,878
Off the Streets Community Initiative	516,500	54,120	5,524	576,144
Replay Productions	0	89,191	91,000	180,191
Cumulative Total £	£1,469,586	£2,468,191	£823,492	£4,761,269

3.1 YEAR 1: 2008/9

A total of **£1,469,586** was leveraged during Year 1 of the programme. Belfast South Community Resources reported the largest amount of leveraged funds, **£743,000** of which **£500,000** was from Department for Social Development (DSD) in Northern Ireland.

Belfast South Community Resources (BSCR) was established in 2005 to provide a more streamlined cost effective service delivery in response to the launch of the Neighbourhood Renewal Programme. BSCR evolved from the amalgamation of a Prisoner's Enterprise Project and Sandy Row Community Development Agency. BSCR located in Sandy Row area of South Belfast is committed to a current programme for the physical and economic renewal of the area. The Department for Social Development (DSD) has committed £500,000 to the organisation to meet both its programme targets for the area in tandem with BSCR's own service delivery plans towards revitalising the area as part of the wider Sandy Row Neighbourhood Sustainability Plan.

3.2 YEAR 2: 2009/10

Leveraged monies spiked during Year 2 to **£2,468,191** with Caring Breaks securing **£899,000** of funding from The Big Lottery Fund as a result of the Foundation's initial investment and the security that funding brought.

Caring Breaks was awarded a grant from the Big Lottery Fund to run the Natural World Challenge project, a five-year programme that commenced in June 2010. The project, delivered in partnership with the Ulster Wildlife Trust, is believed to be unique in the UK. A range of environmental activities are also provided in association with the Royal Society for the Protection of Birds, the Waste Management section of Belfast City Council and with drumming expert Joe Loughlin, who has specialised musical instruments that replicate the sounds of nature. It is intended to expand on the types of activities available and work with new partners as well as developing relationships with existing ones. It is also hoped to introduce a series of day trips throughout the project.

3.3 YEAR 3: 2010/11

Funding tapered off in Year 3 period 2010/11, possibly attributable to both the economic and funding climate in general across Northern Ireland and beyond during times of recession and austerity measures – but equally represented a significant return on investment of **£823,492**.

ESC Ltd secured £135,700 during 2010/11 period from multiple funders of which £90,000 came from Trusthouse/Hollywell for a three-year period. Thus, emphasising the role that the Foundation plays in leveraging additional monies for organisations in general and for Educational Shakespeare Company in particular. ESC wants to enable people to understand and transform their lives, using drama and film to explore and record their stories. Through a core set of values of respect, trust, choice, responsibility, courage, understanding, non-judgementalism and inclusivity, the organisation uses the medium of film and practice of filmmaking to help groups and individuals. To help them understand the potential and power of film for documenting life stories; the practical and technical side of filmmaking; and their own potential for change and personal growth. Through its funding and participation on the Foundation's Creating Change Programme, ESC has developed a series of partnerships with funders and stakeholders towards meeting its mission and vision.

4. OBJECTIVE 3: NETWORKING

Definition:

The networking opportunities that have arisen for Creating Change organisations as a result of the programme, in 3 areas: Peer-to-Peer, Partnerships and Learning Exchange.

DATA COLLECTION

Each organisation's views on Networking were collected by means of a questionnaire – See Appendix 7.1 **Creating Change: Measuring Impact Questionnaire**.

4.1 PEER TO PEER ENGAGEMENTS

A peer-to-peer engagement is defined as an intentional meeting with another Creating Change organisation for a mutually understood purpose. Table 4.1 overleaf indicates 35 instances of organisations reporting peer-to-peer engagements. This does not represent the actual number as an organisation reporting an engagement with another organisation is the same engagement, as it is reciprocal. However, 35 does still represent the number of engagements deemed both valuable and viable to be reported by the organisations.

Table 4.1 Peer-to-Peer Engagements: By Creating Change Organisation (2008-2011)

Organisation	BSCR	CAB Strabane	Caring Breaks Ltd	Cathedral YG	CO3	Cookstown DWG	Dundonald FCI	Easilift CT	ECF Links	ESC Ltd	FAST RT	Homestart Antrim	KIC	Kilkeel PBA	Learmount CDG	Newbuildings CEA	Off the Streets	Replay Productions	Total
BSCR	0																		0
CAB Strabane		1						Y											1
Caring Breaks Ltd			2		Y														2
Cathedral YG				3													Y		3
CO3		Y								Y								Y	4
Cookstown DWG																			0
Dundonald FCI																			0
Easilift CT		Y								Y						Y			4
ECF Links													Y						1
ESC Ltd					Y								Y					Y	3
FAST RT															Y				1
Homestart Antrim																			0
KIC										Y								Y	2
Kilkeel PBA																	Y		2
Learmount CDG																Y			5
Newbuildings CEA															Y				3
Off the Streets														Y					1
Replay Productions									Y	Y		Y							3
Total Engagements	0	2	2	2	2	0	0	3	2	3	2	0	2	2	5	3	2	3	35

4.2 PARTNERSHIPS

Definition:

- A **formal partnership** - one that has a legal agreement or memorandum of understanding
- An **informal partnership** - one that lacks such
- A **direct partnership** - a partnership with another Creating Change organisation.
- An **indirect partnership** - one that has been formed with an organisation outside of the Creating Change Programme.

Organisations such as Replay Productions and Kids in Control have formal partnerships with SEELB and the Rank Foundation, and have gone on to develop a formal partnership with each other. This indicates the need for training for some of the other organisations in seeking formal partnerships both with the larger bodies, and also with each other, as this ties in with the identified need for organisations to develop income generation strategies as well as identify grant funding as specified in **Table 4.2 below**.

Collaborating across the Third Sector
Collaboration involves support and resources across the whole spectrum of collaborative working to Voluntary and Community sector organisations. Any organisation working in the third sector can explore and engage in discussions around collaborating irrespective of its size, geographical location or field of work.

Whether an organisation is at the stage of exploring an idea, seeking a partner, developing an existing relationship/partnership or driving forward an agreed project, the aim of the Foundation is to provide support, training and access to the learning and experience already out there in the sector. A classic case is with CO3 who stated that;

“CO3 have recently entered into partnership working with NICVA and Stellar Leadership to secure its first ever piece of tendered work – Collaboration NI. The procurement training was extremely helpful in setting out some of the key issues for partnership working”.
CO3

Table 4.2 Formal/Informal and Direct/Indirect Partnerships: By Creating Change Organisations.

Organisation	Formal	Informal	Direct	Indirect
BSCR	2	2		4
CAB Strabane	3	1	1	3
Caring Breaks Ltd				
Cathedral YG		4	1	3
CO3	6	6		12
Cookstown DWG	4			4
Dundonald FCI				
Easilift CT		2	2	
ECF Links				
ESC Ltd				
FAST RT		1	1	
Homestart Antrim		1		1
KIC	7		2	5
Kilkeel PBA				
Learmount CDG		3	3	
Newbuildings CEA		3	1	2
Off The Streets				
Replay Productions	3	1	2	2
Total	25	24	13	36

Partnering beyond the Third Sector

For Voluntary and Community sector organisations seeking to collaborate or partner beyond the spectrum of the sector, it is just as important to widen the scope and reach of any organisation working in the sector to explore their options in working with like-minded public, private and other philanthropic organisations.

Whether an organisation is at the stage of exploring a fundraising initiative, seeking a corporate sponsor or developing an existing project or programme of work, the aim of the Foundation is to provide support, training and access to the learning and experience from engaging with other sectors. A sound example is with Kids in Control who stated that investment has enabled:

“A new and greatly enhanced company base, which has raised profile and connections with the sector. The new company address and facilities are having a real impact. This is the start of a partnership that will raise the quality and visibility of arts programming in the special needs sector”.

KIDS IN CONTROL

As part of the Creating Change Programme the Foundation provides a space in a non-competitive and non-threatening manner where organisations are being encouraged to explore collaboration and partnerships with an open and willing disposition rather than in an environment where it is being forced upon them. Organisations feel that this environment is enabling them to make decisions based on what is actually best for them and their beneficiaries instead of being forced to consider partnership and collaborations because public agencies or other funders tell them what is best for them.

4.3 LEARNING EXCHANGES

Definition: An exchange of learning with another Creating Change organisation, either receiving training from the other organisation or delivering training to them.

Peer-to-peer engagements were reported by **16 out of the 18 organisations** funded by the Foundation, in a competitive funding context and, it is noted that these “learning exchanges” were only twice about funding. The potential for future partnership was reported by **6 organisations** and this could have medium to long-term impacts on the Creating Change participant organisations during the next 3-year phase of the programme. **8 organisations** reported as benefiting from the support gained from these exchanges. This support, whilst often also called “networking”, took the form of sharing information, advice, expertise and training and is obviously more than just networking whether formal or informal, largely due to both the nature and extent of engagements between participating organisations within the Creating Change Programme.

All organisations who reported peer-to-peer exchanges highlighted the benefits to them of meeting with other organisations and **11 of the organisations** reported contact with multiple programme organisations i.e. more than one other organisation. For example, Learmount Community Development Group worked with five other organisations to expand their information and to arrange a series of talks/training sessions.

In total, there were **15 reported learning exchanges** between Creating Change organisations between 2008-2011, inclusive. Table 4.3 on the right shows the learning exchanges reported by the organisations.

Shared learning happened most in clusters of organisations who had identified that they shared common goals. For example, Newbuildings Community and Environmental Association engaged with Learmount Community Association to exchange knowledge on their volunteer policies, and to discuss delivering health programmes. They also engaged with Easilift on Midas Training (Minibus Driver Awareness Scheme).

Within these clusters, the learning was either directly for group organisations, for example Cathedral Youth Club engaged with Newbuildings CEA **“To encourage young people to participate in sports in a friendly and competitive manner”**, or was for the benefit of the organisation as a whole, addressing policies, procedures or practice. Four organisations engaged in leadership training offered by CO3. The Learning Exchanges therefore were of benefit within sectors, for participants, and for organisations as a whole.

Table 4.3 Learning Exchanges: By Creating Change Organisation

Organisation	BSCR	CAB Strabane	Caring Breaks Ltd	Cathedral YG	CO3	Cookstown DWG	Dundonald FCI	Easilift CT	ECF Links	ESC Ltd	FAST RT	Homestart Antrim	KIC	Kilkeel PBA	Learmount CDG	Newbuildings CEA	Off the Streets	Replay Productions	OTHER	Total
BSCR																				0
CAB Strabane					Y															1
Caring Breaks Ltd					Y															1
Cathedral YG																				0
CO3															Y	Y				2
Cookstown DWG																				0
Dundonald FCI																				0
Easilift CT											Y									1
ECF Links														Y						1
ESC Ltd																				0
FAST RT																				1
Homestart Antrim																				0
KIC					Y				Y									Y		3
Kilkeel PBA																	Y			2
Learmount CDG																				0
Newbuildings CEA								Y							Y					2
Off the Streets																				0
Replay Productions													Y							1
Total Engagements	0	0	0	0	4	0	0	1	1	1	1	0	1	1	2	1	1	1	0	15

5. OBJECTIVE 4: COMMUNITY IMPACT

INTRODUCTION

The purpose of the Community Impact activity was to engage with each organisation, and undertake the following:

- Identify a stakeholder group that benefited from the work of the Creating Change organisation as supported by the Foundation
- Explore with the representatives of the organisation what they perceived as the significant outcomes experienced by the stakeholders
- To then consult directly with the stakeholders to determine the type and amount of change as experienced by them
- To use the components of SROI methodology to report on the amount of change using impact indicators and financial proxies to lead to a financial representation of the amount of change.

Although the scope of the project undertaken by Gauge did not permit a full SROI analysis, the SROI approach is described in full below, with comments on which elements were included or excluded in this context. Impact analyses were conducted for a 3-year duration of the programme to date, or in some cases for 1-year 2010/11 only. Decisions to only perform a 1-year analysis were informed by circumstances such as where a new programme took the first 2 years to get established or where there was insufficient confidence in being able to extrapolate stakeholder data from the current year back over the previous 2 years.

See Appendix 7.3 Community Impact: Data Collection Proforma as to what information was sought from each organisation.

5.1 SOCIAL RETURN ON INVESTMENT

The SROI model has grown out of recognition that demonstrating added social, economic and environmental value is of increasing importance and relevance. It is a model for measuring and accounting for a broad concept of value; value that is generated as a result of actions but that cannot necessarily be accounted for or captured in traditional monetary terms (i.e. it cannot be bought or sold). The SROI model is used to account for all social, environmental and economic costs and benefits of a particular activity. The approach is to measure these costs and benefits in “ways that are relevant to the people and organisations that experience or contribute to it. It [SROI] tells the story of how change is being created by measuring social, environmental and economic outcomes and uses monetary values to represent them.”

SROI uses monetary values to represent the social, environmental and economic costs and benefits of a programme, enabling an SROI ratio of benefits to costs to be calculated. Whilst the SROI ratio reveals much about a programme’s worth and value, it is important to remember, “SROI is about value, rather than money. Money is simply a common unit and as such is a useful and widely accepted way of conveying value.”¹

¹ Cabinet Office, Office of the Third Sector: A Guide to Social Return on Investment (2008).

5.2 SROI METHODOLOGY

Carrying out an SROI analysis involves five key stages:

STAGE 1	STAGE 2	STAGE 3	STAGE 4	STAGE 5
<ul style="list-style-type: none"> ■ Establish Scope 	<ul style="list-style-type: none"> ■ Identify Inputs 	<ul style="list-style-type: none"> ■ Identify measures of outcomes (Indicators) 	<ul style="list-style-type: none"> ■ Establish direct impact 	<ul style="list-style-type: none"> ■ Calculate Impacts
<ul style="list-style-type: none"> ■ Decide on Stakeholders 	<ul style="list-style-type: none"> ■ Identify Outputs 	<ul style="list-style-type: none"> ■ Quantify indicators (How many) 	<ul style="list-style-type: none"> ■ Deadweight 	<ul style="list-style-type: none"> ■ Social Return Ratio
<ul style="list-style-type: none"> ■ What do you think changes for them? 	<ul style="list-style-type: none"> ■ Describe Outcomes from Stakeholder Perspective 	<ul style="list-style-type: none"> ■ Convert to monetised value via Financial Proxies 	<ul style="list-style-type: none"> ■ Attribution ■ Displacement ■ Drop Off 	<ul style="list-style-type: none"> ■ Apply Discount Factors ■ Apply Sensitivity Analysis

1. Establishing scope and identifying key stakeholders.
It is important to have clear boundaries about what the SROI analysis will cover, who will be involved in the process and how. Often service users, funders and other agencies working with the client group are included in an SROI. In this case, each organisation was required to identify and consult one key stakeholder group.

2. Mapping outcomes.
Through engaging with stakeholders an Impact Map is developed, (also called a theory of change or logic model) which shows the relationship between inputs, outputs and outcomes.

3. Evidencing outcomes and giving them a value.
This stage involves finding data to show whether outcomes have happened and then giving them a monetary value.

4. Establishing impact.
Those aspects of change that would have happened anyway or are a result of other factors are taken out of the analysis. This stage was considered outside the scope of the project.

5. Calculating the SROI.
This stage involves adding up all the benefits, subtracting any negatives and comparing the result with the investment. This is also where the sensitivity of the results can be tested. This stage was considered outside the scope of the project – any calculation of a ratio would have been misleading, as a full SROI was not undertaken.

5.3 MEASURING IMPACT

The methodology for measuring the community impact on a chosen stakeholder group was utilised for 18 organisations using the SROI and “Impact Map” process. A sample of these impacts from a cross-section of organisations are provided as a ‘snapshot’ in time of the multiple outcomes and impacts they are having on their key stakeholder group – whether that be beneficiaries or service users in the form of ex-offenders, youth, women or older people from across communities in Northern Ireland.

Educational Shakespeare Company Ltd (ESC Ltd)

The Educational Shakespeare Company Ltd (ESC Ltd) was established in 1999 to provide educational opportunities for disadvantaged or socially excluded people through drama and film. ESC Ltd chose their Ex-Offenders stakeholder group as the focus for the stakeholder impact analysis. As one of the obvious values of their work emerged as the contribution to preventing ex-offenders re-offending, the benefit to wider society was also deemed of value to consider.

20 ex-offenders have been engaged with over the past 3 years and 7 current participants were consulted with. The key themes that emerged from the analysis were beneficiaries have avoided re-offending and experienced significant increases in self-confidence and skill levels.

Key Outcomes:

- Less re-offending reported contrary to typical rates of re-offending from parallel group.
- Have learned new skills.
- Increased self-confidence and more social interaction.

As seen in the ESC Ltd Impact Map (see appendix 7.4), the most significant social value was that to wider society as represented in the higher proportion of ex-offenders not re-offending than would normally be expected as reported in national figures.

Comments from Ex-Offenders:

- *“I’ve never been back to jail.”*
- *“I can now get up and talk in front of people.”*
- *“I’ve learned to listen to other peoples’ point of view.”*
- *“ESC has given me hope.”*

Cathedral Youth Group (Cathedral YG)

Cathedral YG provides a means for youth of the Fountain area of Londonderry to participate in community and cross-community activities, to develop the skills necessary to participate and excel in higher education, to find better higher-paying jobs, be better citizens and to enjoy a peaceful and happy life.

Currently 110 young people are active in the activities of the group, ranging in age from 3 to 26, with the main concentration being between 14 and 19. Cathedral YG runs a wide range of activities, including drama, digital photography, sports and a magazine. The facilities are open daily from 9.30am to 5.00pm and 7.00pm to 10.00 pm. The key social values identified were those to the young people themselves, and also to society through preventive programme measures provided by Cathedral YG.

Key Outcomes:

- Reduced anti-social behaviour
 - Reduced levels of crime in local area
 - Positive programme experiences
 - Safe and social environment of the Cathedral YG
- In the 17 responses from young people consulted, 7 reported a reduction in the amount of their “getting into trouble” and 4 reported a significant reduction. The collected data indicates that CYG is a major contributor to enabling young people to be more involved in positive activities, both for their area and their own development.

Comments from Young People:

- *“Gets me out of trouble”.*
- *“It has meant a great deal to me as it keeps me off the street.”*
- *“Taught me new skills. Improved my confidence and self esteem.”*
- *“If the youth club wasn’t here I’d have nowhere to go. I still don’t work so it offers me a welcome, safe place.”*
- *“What it means to me...EVERYTHING!”*

Cookstown & District Women’s Group (Cookstown DWG)

Cookstown DWG provide a variety of courses to reflect the range of interests amongst the beneficiaries in the area, to increase mutual understanding and co-operation across existing divisions within the community. Also, to promote the health and wellbeing of children from an early age and to raise awareness of ‘entitlement of learning’ for those with literacy, numeracy and other learning needs.

Key Outcomes:

- Increased confidence, social interaction and self-esteem via attendance at course
- Increased volunteering
- Increased social interaction
- Improved mental wellbeing
- Part-time jobs gained as a result of completing course

Cookstown DWG chose the participants in their “Fly Free Assertiveness and Confidence Building” group. There have been 90 participants in the 10-week programme over the past 3 years.

Comments from Participants:

- *“Seen an improvement of where I was at and now where I am. Only getting better and better.”*
- *“I am out of the dark tunnel and into the light.”*
- *“I now have a purpose in life and enjoy tutoring within my part time business.”*
- *“All round better attitude to life. More sociable. Not scared to go out and about on my own.”*
- *“I am being given tools to change my life.”*

Easilift Community Transport (Easilift CT)

Easilift CT operates five 16-seat accessible minibuses in the Strabane District and three 16-seat accessible minibuses in the rural Derry City Council area. Transport services are provided for people living in rural areas with the specific aim of reducing social exclusion and isolation. Easilift CT chose their Castledearg and Plumbridge service as the focus of the impact analysis. There are approximately 126 rurally located users of this service. 42 users were consulted with reference to the perceived value of the service in relation to being able to get to urban areas for purposes such as shopping, health appointments and social visits.

Key Outcomes:

- Affordable transport to urban centre for appointments, shopping and social activities.
- Increased social interaction for users when on the bus, who are otherwise isolated.
- Family/Friends not needing to sacrifice work time to escort users.

The economic value of using the service rather than alternative (if available) methods of transport was significant, as was the value associated with not having to rely on family members, neighbours or friends having to sacrifice work to transport them.

Comments from Participants:

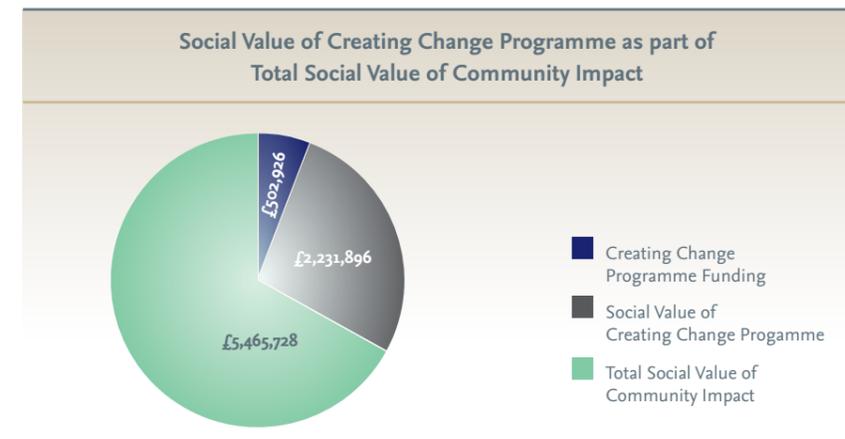
- *“Gets me out to meet people and don’t have to bother family”.*
- *“Not as isolated”.*
- *“It is a great service for people in rural areas. It is marvellous”.*
- *“Means I can go on outings without having to worry about the cost of travel”.*
- *“It means a lot. I would have to pay a taxi which would be quite considerable”.*
- *“Takes pressure off working family members”.*
- *“Couldn’t manage without them”.*

5.4 SOCIAL VALUE OF COMMUNITY IMPACT

The social value generated by the Foundation’s Creating Change Programme investment as part of the overall community impact and social value created was calculated across all 18 participant organisations. The findings revealed the following:

- Total funding by the Foundation for **Community Impact** alone amounted to **£502,926** over a 3 year period;
- This investment generated a **social value** of **£2,231,896**;
- Considering all the funding achieved by the organisations, the total amount of **social value realised** amounted to **£5,465,728**.

The financial leverage ratio was calculated by totalling all the investment amounts and comparing them with the social value figures. On trying to generate a comparison of these figures a difficulty occurred as some organisations were analysed over a 3 year period and some over just the one year. This has therefore been taken into account in the investment figures. The Foundation’s percentage of the total investment was applied to the total social impact amount, thus obtaining the Foundation’s attributable portion of the total social value, as shown in the pie chart below.



The methodology of SROI was used as an underlying theme to this analysis, but not all the principles could be used.¹ Based on each Creating Change participant organisation and their respective stakeholder group, clearly there is significant social value being created by both the Foundation's financial input alongside additional funders. The extrapolation of these figures in **Table 5.4** illustrates the Foundation's programme funding alongside the total funding generated. This is then compared with the impact of the Creating Change programme investment in the context of the total social value created. It is certainly clear that the Foundation's investment is attributing towards the achievement of organisation's outcomes through the Creating Change Programme and having a positive collective community impact on the work of the 18 organisations supported in both financial and non-financial ways.

Table 5.4 Social Value Analysis: By the Foundation's Creating Change Programme Funding

In commissioning this research it was never the intention of the Foundation to use the data collected to create a League Table of the organisations contained within the Creating Change Programme. The Foundation recognises that all organisations remaining within the programme are effectively delivering on the individual quantitative and qualitative objectives originally agreed between the Foundation and the organisations at the outset.

Whilst the Social Value Analysis makes for impressive reading, the Foundation acknowledges the existence of limitations within the figures reported namely, the issue of contribution/attribution, the selection of the stakeholder group analysed, the impact of other funding

support and not least, the stage of development of each organisation as a whole and of particular projects being implemented by those organisations.

The Foundation is justifiably gratified with the efforts of all the Creating Change organisations and the considerable impact they are making in local communities for the benefit of people in need throughout Northern Ireland.

Table 5.4 Social Value Analysis: By the Foundation's Creating Change Programme Funding

Organisation	Creating Change Programme Funding	Other Sources of Funding	Total Funding	Creating Change Programme % Total Funding	Total Social Value of Organisation's Community Impact ²	Total Social Value of Creating Change Programme
BSCR	15,000	44,655	59,655	25.14	178,813	44,962
CAB Strabane	60,000	21,722	81,722	73.42	388,621	285,324
Caring Breaks Ltd	60,000	395,058	455,058	13.19	892,800	117,717
Cathedral YG	60,000	351,907	411,907	14.57	1,346,368	196,117
CO3	20,000	2,250	22,250	89.89	43,200	38,831
Cookstown DWG	20,400	0	20,400	100.00	321,954	321,954
Dundonald FCI	4,673	0	4,673	100.00	7,034	7,034
Easilift CT	60,000	6,000	66,000	90.91	302,108	274,644
ECF Links	2,850	8,550	11,400	25.00	45,378	11,345
ESC Ltd	60,000	60,500	120,500	49.79	1,265,201	629,976
FAST RT	13,000	0	13,000	100.00	20,541	20,541
Homestart Antrim	20,000	14,000	34,000	58.82	127,729	75,135
Kids in Control	9,755	39,782	49,537	19.69	106,113	20,896
Kilkeel PBA	20,000	27,397	47,397	42.20	86,980	36,703
Learmount CDG	1,832	0	1,832	100.00	17,637	17,637
Newbuildings CEA	4,378	2,280	6,658	65.76	78,456	51,589
Off the Streets	60,000	238,333	298,333	20.11	174,467	35,088
Replay Productions	11,038	3,788	14,826	74.45	62,328	46,403
Sub-Totals	£502,926	£1,216,222	£1,719,148	29.25	£5,465,728	£2,231,896

¹The full Social Return on Investment methodology has not been fully applied in the community impact calculations due to a number of factors including time, resources and research budgetary restrictions.

² Figures are based on a combination of 1 and 3 year analysis figures from Impact Maps across all 18 Creating Change Programme organisations (refer to Appendix 7.4).

6. CONCLUSIONS, LIMITATIONS & RECOMMENDATIONS

6.1 CONCLUSIONS

The specific conclusion relating to the initial outcome measure of the analysis are highlighted below for reference:

OBJECTIVE 1 – Added Value

Training events have proven to be of considerable value, being cited as the number one added value benefit experienced by the group. The Foundation consults with groups twice per year on what additional training would be useful for them showing a genuine wish to deliver quality training in areas where groups need it and to build real relationships between all parties. It is to be generally acknowledged that the Foundation listens to the participant's views and equally that organisations actively listen to Foundation staff through a combination of verification visits, mentoring and annual evaluation activities. The actual time and resources committed to these activities by the Foundation may well merit further financial analysis in the next three years of Creating Change Programme delivery.

OBJECTIVE 2 – Financial Leverage

From an initial investment by the Foundation of £1,122,135 during the first three years, the 19 organisations have reported that initial programme funding enabled them to access an additional £4,761,269 from other funders. The confidence of the additional funders to invest in those

organisations has come from a combination of the Foundation's name and the "longer-term" funding nature of the Creating Change Programme. This is an impressive figure, although additional validation or auditing could be undertaken to confirm its total accuracy. Within the scope of this report we are confident that the amounts represented are a true and accurate statement of financial monies gained and vouched as a result of organisations participation on the Creating Change Programme.

OBJECTIVE 3 – Networking Opportunities

Through peer-to-peer networking, the creation of formal and informal partnerships and the degree of learning exchanged between organisations, it is clear that the Foundation's Creating Change Programme has significantly broadened the vision and deepened the capability of several organisations. Whilst there is an appreciation that some organisations are more proactive than others in extending and exploring the networks and networking opportunities made available to them through the Foundation, it is worth noting that other organisations may well avail of opportunities in the next three years of the programme or indeed beyond its lifetime. It may be valuable to further analyse the nature of and success of these emerging areas of co-operation and mutual support moving forward during this time period.

OBJECTIVE 4 – Community Impact

From the outset of this project there was an intention to apply SROI principles and methodology to the Community Impact study. It was also understood that the project would be more broad than deep, and that each organisation's Impact Map would have to be limited to a single, significant stakeholder group and a finite number of material outcomes. Nonetheless, as can be clearly seen from the Impact Maps (see Appendix 7.4) there are multiple outcomes occurring across all organisations within the Creating Change Programme. The impacts for measuring outcome are not fully realised as they go beyond the remit of this work.

Overall, it is abundantly evident that the Foundation offers more than just financial support. In fact, it may be argued that the non-financial support is just as valuable as the grant monies disbursed to organisations. However, the key message for other funders or philanthropic trusts or foundations is that lessons can be learned and disseminated from this innovative programme and the Foundation's work in developing longer-term sustainable funding for Third Sector organisations. Yet, just as important, is how they have matched their financial investment with a planned, co-ordinated and active "Grants-Plus" philosophy. This gives maximum returns not just financially for organisations funded but, ultimately maximises the outcomes and impacts for those constituents, communities and stakeholders. Perhaps, this is the true test of creating change and measuring impact.

6.2 LIMITATIONS

Although all organisational representatives had an opportunity to become aware of SROI through the training provided by Gauge in February/March 2011, the depth of learning was insufficient to enable those representatives to play an active role in the creation of the Impact Map outputs. However, the training did establish and strengthen participant's ability to communicate in terms of outputs, outcomes, indicators and financial value for organisations.

In many cases organisation's stakeholders were consulted with use of a questionnaire co-designed by Gauge and the Foundation to identify qualitative outcomes in a way that permitted quantification and measurement. This proved quite challenging largely due to the extent to which those administering the questionnaires were able to draw out quantitative indicators of the outcomes.

This is clearly a challenge that faces all such evaluation processes, but time constraints in this project prevented any iterative approaches to the data collection process. As a result, the community impact (social value) of the work of some organisations will be understated as a consequence of the constraints on the project – e.g. the value of continued independent living as a result of avoided accidents in the case of "Good Morning" or Befriending services, or the value of behavioural change or relationship strengthening in the case of family or youth services would merit further analysis and extrapolation of data. However, this was beyond the remit of this specific work.

Whilst the social values and financial proxies vary across each Creating Change organisation this is largely due to the nature of the project, programme, or service being offered by each organisation, coupled with the context of their work and notwithstanding any specific geographical, scale or reach issues with their communities. It is important to distinguish that SROI is not used as a 'benchmarking' exercise to compare the social or economic value an organisation offers in terms of its material outcomes. As comparisons between organisations can be made in some instances, for example, between Arts-based organisations, it is neither relevant nor appropriate to perform any real meaningful comparison of organisations and their community impact.

6.3 RECOMMENDATIONS

For Participants, the level of mentoring, peer-to-peer engagement, and networking in general could be more formally captured as part of the Foundation's annual Monitoring and Evaluation activities and recognised with an allocation of time and resources to derive an actual financial benefit within the remaining three-years of the programme.

For Organisations, the Community Impact aspect of the work undertaken shows that significantly more social value is created than is monetarily inputted by the Foundation and other funders, and these analyses, although not complete SROI undertakings, point to the significant contribution the organisations are making to the groups they work with. This could be a catalyst towards further

adopting SROI as an approach to evaluate what they do and potentially plan for future programmes using SROI as a guide to the planning process.

For the Foundation, the non-financial investments the Foundation puts in place through its "Grants-Plus" approach could well merit future analysis as to the actual financial value this represents in real terms beyond the pure disbursement of grant monies. Equally, for the Foundation, the learning from this project may inform how it evaluates the ultimate success of the six year programme, and may also influence other funding initiatives.

7. APPENDICES

7.1 CREATING CHANGE: MEASURING IMPACT QUESTIONNAIRES

Introduction

Gauge NI have been commissioned by the Foundation to evaluate the progress of the Creating Change Programme to date against 4 measurable objectives:

1. Added Value
2. Leverage
3. Networking Opportunities
4. Community Impact

The first 3 measurable objectives relate to the change experienced by the staff and volunteers of the Creating Change organisation being grant assisted. The last objective, Community Impact, relates to the change as experienced by a stakeholder of the organisation, most likely a significant group of service

Target Date: 18th March 2011

Rank	Description of Engagement	Who was it with?	Direct or Indirect	Describe what value it added to the organisation
1				
2				
3				

users who have benefited from the programmatic output of the organisation.

This questionnaire relates to **objectives 1 and 3 only**. Please read the instructions carefully and provide the aggregated results in the fields highlighted by the date stated on each.

Any queries should be addressed to projects@gaugeni.co.uk

OBJECTIVE 1 – Added Value

Background – The Foundation wish to measure the engagements each organisation have benefited from as a result of the Creating Change Programme, and for each organisation, to understand what the top 3 added values engagements have been.

Possible examples of engagements – Training events, mentoring support, the Foundation verification, etc.

Engagements could be direct (with or arranged by the Foundation or another Creating Change Organisation) or Indirect (arising out of the programme but with someone external to the programme)

Potential contributors to the data collection – any staff or volunteers who have engaged

What to do – ask contributors to answer the questions below, and then aggregate the data to provide 1 response on behalf of the organisation

How to return – email completed response to: projects@gaugeni.co.uk

OBJECTIVE 3 – Networking

Background – The Foundation wish to measure the networking opportunities that have arisen for Creating Change organisations as a result of the programme, in 3 areas: Peer-to-peer, Partnerships and Consortia, Learning Exchanges

Potential contributors to the data collection – any staff or volunteers who have benefited from any of the networking opportunities described below

What to do – ask contributors to answer the questions below, and then aggregate the data to provide 1 response on behalf of the organisation

How to return – email completed response to: projects@gaugeni.co.uk

Target Date: 1st April 2011

Purpose of Partnership	Who was it with?	Formal or Informal	Direct or Indirect

3.1 Peer-to-Peer Engagements

A peer-to-peer engagement is defined as an intentional meeting with another Creating Change organisation for a mutually understood purpose. Please complete the table below:

Who was it with?	What was its purpose?

3.2 Partnerships/Consortia

You may have formed partnerships with other organisations toward a common objective. Please complete the table at the bottom of the page. The following definitions will help:

A **formal** partnership – one that has a legal agreement or memorandum of understanding

An **informal** partnership – one that lacks such

A **direct** partnership – a partnership with another Creating Change organisation

An **indirect** partnership – one that has been formed with an organisation outside of the Creating Change Programme, but that has happened as a result of your involvement in or benefit from the programme.

7.2 COMMUNITY IMPACT: MEETING TEMPLATE/IMPACT MAP PROFORMA

- Date:**
- Present:**
1. Organisation
 2. Key Contact
 3. Chosen Stakeholder Group
 - Description/Name of Group:
 - Number of members:
 - Link to the Foundation funding:
 - Other funding links?
 - Time period of analysis:
 4. Can stakeholders be consulted easily?

Stakeholders	Intended/ unintended changes	Inputs		Outputs	Possible Indicators	Financial Proxies
		What will/do they invest?	Value £			
Who will we have an effect on? Who will have an effect on us?	What do we think changes for them? (Anticipated Outcomes)			Summary of activity in numbers	Description of the changes from the perspective of the stakeholders	Measurements of the outcomes
Focus Stakeholder Group:						
Stakeholder Inputs:						

7.3 COMMUNITY IMPACT: DATA COLLECTION PROFORMA

Consulting Stakeholders for their view of outcomes

- Any existing M&E data?
- Options for data collection

Data Collection Plan:

STAGE 1 – Conduct a preliminary meeting with the representatives of the organisation, following the template detailed.

The key outputs from the meeting would be:

- Identification of a suitable stakeholder group to measure impact against
- Consideration of the changes experienced by the stakeholders, as perceived by the representatives of the organisation.
- Identification of a suitable stakeholder group to measure impact against

- Consideration of the changes experienced by the stakeholders, as perceived by the representatives of the organisation.

- Design of a means of consulting the stakeholders to collect quantitative and qualitative indicators of the change experienced by them.

- Determination of the funding support by the Foundation that could be linked to the chosen stakeholder group, and funding from other funders.

- The Foundation that could be linked to the chosen stakeholder group, and funding from other funders

- Agreement on responsibilities and deadlines for the collection of the stakeholder responses perceived by the representatives of the organisation.

STAGE 2 – Consult Stakeholders (or use pre-existing data already collected by the organisation).

STAGE 3 – Create an Impact Map that would present the data collected from stakeholders and, where possible, relate to financial proxies that would permit a means of attributing monetary value to the amount of change.

In most cases it has been possible to conduct the analysis for all 3 years of the Foundation's funding – in a few it was deemed more appropriate to present the impact on a per annum basis, using current data.

Action	Responsible	Due Date

IMPACT MAPS

The project outcomes, indicators and financial proxies have been chosen that represent the social value created for the selected stakeholder group for each Creating Change Programme participant organisation.

This process involves ‘mapping’ these across the stages of SROI from inputs, outputs, outcomes to impact. However, in some cases this was somewhat easier than others. Where it has not been possible to identify a marketplace value representing the change for the stakeholder directly, other values (financial proxies) have been considered which include changes for other relevant stakeholders or the state.

It is important to note that these Impact Maps only provide analysis of one selected stakeholder group relevant to

the Creating Change Programme. Whilst the principles of SROI have been applied they do not represent a full SROI analysis as discounting and sensitivity factors have not been allowed for due to time and resource issues. Nonetheless, they do represent the social value created based on the identified stakeholder outcomes and in particular the Foundation’s financial input which contributed to both the social value created alongside other funders that enabled each organisation to carry out its work and achieve the multiple outcomes therein.

ORGANISATION BELFAST SOUTH COMMUNITY RESOURCES (3 YEAR ANALYSIS)

Stakeholders	Intended/unintended changes	Inputs	Outputs	Outcomes (What changes?)	Indicators	Source	Quantity	Financial Proxy	Financial Proxy	Source	Value Multiplier*	Value (3 Years)
Who will we have an effect on? Who will have an effect on us?	What do we think changes for them? (From Perspective of organisation representatives)	What will/do they invest?	Summary of activity in numbers	Description of the changes from the perspective of the stakeholders	Measurements of the outcomes	Where did we get the information?	How much change was there?	Unit value of financial proxy	What financial proxy did we use?	Where did we get the financial proxy?	Based on Respondents vs. Total Stakeholders (Where applicable)	What is the value of the change
Focus Stakeholder Group: IT Course Participants	Increased confidence and competence in IT skills			Increased confidence and competence in IT skills	Hours attendance at courses	BFCR	5,675	£2.00	Hourly cost of a typical NVQ Level 2 course	Belfast Met Part Time Prospectus 2011	N/A	£11,350
	Promotion prospects if employed		240 students over 3 years	Improved social interaction and less isolation	Hours at courses of 18 of 30 respondents reporting increased social interaction as of value (=60% of all hours)	Questionnaires	3,495	£3.00	Hourly value of being socially active	Typical cost of going to a leisure centre	N/A	£10,215
	Employability prospects if unemployed			Increased employability and actively seeking employment	# of respondents reporting increased activity in seeking employment	Questionnaires	9 of 30 respondents	£28/week, 52 weeks per year, 1.5 years (1)	Potential Earning increase in gaining a level 2 qualification	www.thesroi database.org	8	£57,248
Stakeholder Financial Inputs:												
LTSBFI		Funds	£15,000									
Others		Funds	£44,655									
Stakeholder Numbers												
Total		240										
Number of responses from stakeholders		30										
Value Multiplier*(Total/Responses)		8										

*Value Multiplier is applied where an outcome quantity has been derived from the sub-set of stakeholders who provided responses to questionnaires/interviews. The multiplier is the ratio of respondents to the total stakeholder group.

**ORGANISATION
CITIZENS ADVICE BUREAU STRABANE (3 YEAR ANALYSIS)**

Stakeholders	Intended/unintended changes	Inputs		Outputs	Outcomes (What changes?)	Indicators	Source	Quantity	Financial Proxy	Financial Proxy	Source	Value Multiplier*	Value
		What will/do they invest?	Value £										
Who will we have an effect on? Who will have an effect on us?	What do we think changes for them? (From Perspective of organisation representatives)			Summary of activity in numbers	Description of the changes from the perspective of the stakeholders	Measurements of the outcomes	Where did we get the information?	How much change was there?	Unit value of financial proxy	What financial proxy did we use?	Where did we get the financial proxy?	Based on Respondents vs. Total Stakeholders (Where applicable)	What is the value of the change
Focus Stakeholder Group: Rural Telephone CAB Users	Convenience of not having to travel to Strabane - transport, babysitting, help from family, taking time off work			4,767 Hours of advice given 6,233 individual calls 6,105 individuals	Not having to travel therefore saving cost of transport Not having to take time off work Not having to arrange care for dependent	Miles travelled if having to visit office Time off work to travel for those who would have needed childcare Time care needed for dependent	Questionnaire	15,942 1,460 4,370	£1.00 £13.84 £5.95	Cost of taxi per mile National Average hourly wage Hourly cost of babysitter	www.payscale.com www.sitters.co.uk	N/A N/A N/A	£5,942 £20,206 £24,812
	Value of advice - e.g. income maximisation, employment rights				Value of advice given on matters such as benefits, employment... leading to financial outcomes below	Hours of valuable advice received	CAB Data	4,767	£13.80	Hourly rate of advice	Assumed hourly rate for advice	N/A	Represented below
	Reduction in stress - better mental wellbeing				Value of advice given in measured financial outcomes Reduction in stress - better mental wellbeing	Value of income generated Scale measurement of change between 1 and 10	Questionnaires	327,661	None	Not applied		N/A	£327,661
Stakeholder Financial Inputs:													
LTSBFNI		Funds	£60,000										
Others		Funds	£21,722										
Stakeholder Numbers													
Total			6,105										
Number of responses from stakeholders			81										
Value Multiplier*(Total/Responses)			75.37										

*Value Multiplier is applied where an outcome quantity has been derived from the sub-set of stakeholders who provided responses to questionnaires/ interviews. The multiplier is the ratio of respondents to the total stakeholder group.

**ORGANISATION
CARING BREAKS LTD (3 YEAR ANALYSIS)**

Stakeholders	Intended/unintended changes	Inputs		Outputs	Outcomes (What changes?)	Indicators	Source	Quantity	Financial Proxy	Financial Proxy	Source	Value Multiplier*	Value
		What will/do they invest?	Value £										
Who will we have an effect on? Who will have an effect on us?	What do we think changes for them? (From Perspective of organisation representatives)			Summary of activity in numbers	Description of the changes from the perspective of the stakeholders	Measurements of the outcomes	Where did we get the information?	How much change was there?	Unit value of financial proxy	What financial proxy did we use?	Where did we get the financial proxy?	Based on Respondents vs. Total Stakeholders (Where applicable)	What is the value of the change
Focus Stakeholder Group: Carers and dependents with learning disabilities	Dependents - reduced isolation and more social interaction. Improvement in behaviour and increased independence Carers - Respite time and reduced stress			16 Weekend Breaks for carers and dependents per annum 48 Families over 3 years 4 hours per week group activities, 9 groups of 8 per week, 50 weeks per year	Reduced social isolation and increased interaction with peers/friends Respite time for carers to relax and pursue own interests (assume 2 carers per dependent) Weekends away - fun/holiday time for dependents and extended respite time for carers	Person Hours over 3 years Person Hours over 3 years	Caring Breaks	43,200 86,400	£13.80 £3.00	Cost per hour to provide befriender/ carer - national average wage Value of leisure time	www.payscale.com	N/A N/A	£596,160 £259,200
	Dependents - "going on their holidays"				Weekends away - fun/holiday time for dependents and extended respite time for carers	48 of weekend breaks * 3 of dependents and carers	Caring Breaks	48 96	£400.00 £190.00	Typical value of a tailored Activity Centre Weekend inc meals and transport	Caring Breaks data www.activityireland.com	N/A	£9,200 £18,240
Stakeholder Financial Inputs:													
LTSBFNI - weekend breaks funding		Funds	£19,230										
LTSBFNI - other activities funding		Funds	£40,770										
BHSCT - other activities funding		Funds	£395,058										
Stakeholder Numbers (Families)													
Total			48										
Number of responses from stakeholders			22										
Value Multiplier*(Total/Responses)			2.18										

*Value Multiplier is applied where an outcome quantity has been derived from the sub-set of stakeholders who provided responses to questionnaires/ interviews. The multiplier is the ratio of respondents to the total stakeholder group.

ORGANISATION CATHEDRAL YOUTH GROUP (3 YEAR ANALYSIS)

Stakeholders	Intended/unintended changes	Inputs		Outputs	Outcomes (What changes?)	Indicators	Source	Quantity	Financial Proxy	Financial Proxy	Source	Value Multiplier*	Value
		What will/do they invest?	Value £										
Who will we have an effect on? Who will have an effect on us?	What do we think changes for them? (From Perspective of organisation representatives)			Summary of activity in numbers	Changes from the perspective of the stakeholders	Measurements of the outcomes	Where did we get the information?	How much change was there?	What financial proxy did we use?	Unit value of financial proxy	Where did we get the financial proxy?	Based on Respondents vs. Total Stakeholders (Where applicable)	What is the value of the change
Focus Stakeholder Group: Young People (and wider society - behaviour). Age range 3 to mid 20's	Increased confidence and skills - business, english, IT, photography, creative writing, art, magazine production			110 young people per year 12 different programmes 12,333 hours of young people engagement over 3 years in structured programmes 243,750 hours spent at club in safe, positive environment	Fun, learning activity through engagement in structured programmes Positive, valuable time spent socialising with friends in safe, positive environment Adult learning via courses in partnership with North West Regional College Improved attitudes in divided community locale	Participant Hours	Data from CYC	12,333 243,750	Hourly cost of attending a secondary school Value of leisure time	£5.40 £3.00	www.bbc.co.uk 12 Jan 2011 Typical hourly cost of attending a leisure centre	N/A N/A	£66,598 £734,250
	Increased employability					Journey Travelled - average between 0 and 10	Questionnaires	4.6	None			N/A	
	Reduced anti-social behaviour				Number of avoided crimes	# of young people reporting dramatic reduction in "getting into trouble" - assume 4 per year as 4 such responses from 17 total	Questionnaires	12	Cost to society of 1 crime committed by someone on a community sentence	£6,700	Home Office 2005 marked up by inflation	6.5	£522,600
Stakeholder Financial Inputs:													
LT&BFNI		Funds	60,000										
Others		Funds	351,907										
Stakeholder Numbers													
Total			110										
Number of responses from stakeholders			17										
Value Multiplier*(Total/Responses)			6.5										

* Value Multiplier is applied where an outcome quantity has been derived from the sub-set of stakeholders who provided responses to questionnaires/interviews. The multiplier is the ratio of respondents to the total stakeholder group.

ORGANISATION CO3 (1 YEAR ANALYSIS)

Stakeholders	Intended/unintended changes	Inputs		Outputs	Outcomes (What changes?)	Indicators	Source	Quantity	Financial Proxy	Financial Proxy	Source	Value Multiplier*	Value (PA)
		What will/do they invest?	Value £										
Who will we have an effect on? Who will have an effect on us?	What do we think changes for them? (From Perspective of organisation representatives)			Summary of activity in numbers	Description of the changes from the perspective of the stakeholders	Measurements of the outcomes	Where did we get the information?	How much change was there?	What financial proxy did we use?	Unit value of financial proxy	Where did we get the financial proxy?	Based on Respondents vs. Total Stakeholders (Where applicable)	What is the value of the change
Focus Stakeholder Group: Participants on CO3 Mentoring Programme	Receive high value mentoring input from experienced leaders in the sector over course of year Better equipped to carry out their role in areas of governance, leadership, fundraising, staffing			18 Mentees, 18 Mentors	Improved competencies for their job "Distance Travelled" indicators collected by CO3 - see below	Received expert advice from mentors 24 hours per Mentor * 18 Mentors	CO3	432	Value of executive coaching	£100.00	CO3	N/A	£43,200
						Amount of distance travelled on scale of 1 to 10 gathered by CO3	CO3	See below	Not identified within scope of project			N/A	
Stakeholder Financial Inputs:													
LT&BFNI		Funds	£20,000										
Others		Funds	£2,250										
Stakeholder Numbers													
Total			18										
Number of responses from stakeholders			N/A										
Value Multiplier*(Total/Responses)			N/A										

* Value Multiplier is not applicable

Mentoring Objectives	Rating before (out of 10)	Rating After (out of 10)
Advice and support	6	7
Networking	6	7
Tapping in to experience	6	7
Dealing with partnership relationships	3	6
Having open conversations with other organisations re the future	2	8
Improving CEO relationship with Board	6	9
Dealing with a difficult employee issue	4	9
Securing new avenues of income	3	7
Becoming more confident in role as manager/leader	4	8
Improving external communications	4	6
Defining leadership approach	5	7
Business planning	4	8
Dealing with elected officers	2	8
Confidence	4	8
Advice on managing change	5	7

Note: a fuller analysis would refer to the distance travelled against these objectives, and relate to a value per unit of distance travelled.

ORGANISATION COOKSTOWN & DISTRICT WOMEN'S GROUP (3 YEAR ANALYSIS)

Stakeholders	Intended/unintended changes	Inputs	Outputs	Outcomes (What changes?)	Indicators	Source	Quantity	Financial Proxy	Financial Proxy	Source	Value Multiplier*	Value
Who will we have an effect on? Who will have an effect on us?	What do we think changes for them? (From Perspective of organisation representatives)	What will/do they invest?	Summary of activity in numbers	Description of the changes from the perspective of the stakeholders	Measurements of the outcomes	Where did we get the information?	How much change was there?	Unit value of financial proxy	Where did we get the financial proxy?	Based on Respondents vs. Total Stakeholders (Where applicable)	What is the value of the change	
Focus Stakeholder Group: Fly Free Assertiveness and Confidence Building Group	Journey from fear, worry and isolation to confidence, increased activity and social interaction	Value £	90 participants 2,040 Participant hours 60 hours mentoring 300 hours pro bono coaching	Increased confidence, social interaction and self esteem via course attendance Increased volunteering Increased social interaction	Participant hours in course Hours over 3 years assuming 1.5 years per positive respondent Hours over 3 years assuming 1.5 years per positive respondent	Questionnaires and data from C&DWG	2,040 3,744 5,382	£2.00 £5.93 £3.00	Belfast Met 2011 Part time Prospectus www.direct.gov.uk Typical leisure centre cost per hour	N/A 5 5	£4,080 £111,009 £80,730	
	Improved Mental Wellbeing			All respondents reported improved mental wellbeing	Insufficient data to apply value to	Questionnaires				N/A		
	New skills and enhanced employability			Additional courses taken as a result of new confidence and wellbeing	# of courses reported	Questionnaires	21	£100.00	Belfast Met 2011 Part time Prospectus	5	£10,500	
				Jobs (Part Time) reported as a result of the course (5 of 18 respondents)	Assumed hours per week over 1.5 years see notes (1) and (2)	Questionnaires	3,900	£5.93	www.direct.gov.uk	5	£115,635	

Stakeholder Financial Inputs:

LTSBFNI	Funds	£20,400
Stakeholder Numbers		
Total		90
Number of responses from stakeholders		18
Value Multiplier*(Total/Responses)		5

* Value Multiplier is applied where an outcome quantity has been derived from the sub-set of stakeholders who provided responses to questionnaires/ interviews. The multiplier is the ratio of respondents to the total stakeholder group.

(1) assumes the average time the participants have had the jobs is 1.5 years - half the duration of the LTSBFNI support.

(2) assumes 10 hours per week.

ORGANISATION DUNDONALD FAMILY COMMUNITY INITIATIVE (1 YEAR ANALYSIS)

Stakeholders	Intended/unintended changes	Inputs	Outputs	Outcomes (What changes?)	Indicators	Source	Quantity	Financial Proxy	Financial Proxy	Source	Value Multiplier*	Value (PA)
Who will we have an effect on? Who will have an effect on us?	What do we think changes for them? (From Perspective of organisation representatives)	What will/do they invest?	Summary of activity in numbers	Description of the changes from the perspective of the stakeholders	Measurements of the outcomes	Where did we get the information?	How much change was there?	Unit value of financial proxy	Where did we get the financial proxy?	Based on Respondents vs. Total Stakeholders (Where applicable)	What is the value of the change	
Focus Stakeholder Group: Dads & Kids (D&K) and Mums (Respite) - Age Range Primary School +	Have fun with child and build better relationships Increased engagement with child in family life Dad peer to peer friendships	Value £ Time	Summary of activity in numbers Number of dads/ kids (12,16) Number of programme activities (10 per year) No. of hours involvement (2.5 per event) 3 special events, 3 hours per event	Having fun together Increased confidence in being a dad Respite time for Mum	Hours spent together in fun activities * # of participants 88% of dads reporting increased confidence Hours of respite * # of Mums	Dundonald FCI Dundonald FCI	952 7 408	£5.00 £100.00 £3.00	Research of various fun/activity complexes Belfast Met 2011 Prospectus Typical cost of 1 hour at a leisure centre	N/A 1.5 N/A	£4,760 £1,050 £1,224	

Stakeholder Financial Inputs:

LTSBFNI	Funds	£4,673 pa
Stakeholder Numbers		
Total	12 Dads	
Number of responses from stakeholders	8	
Value Multiplier*(Total/Responses)	1.5	

* Value Multiplier is applied where an outcome quantity has been derived from the sub-set of stakeholders who provided responses to questionnaires/ interviews. The multiplier is the ratio of respondents to the total stakeholder group.

The impact of the improved Dad/Child relationship and improved child engagement in family life could be significant but could not be measured and valued within the scope of this analysis.

ORGANISATION EASILIFT COMMUNITY TRANSPORT (3 YEAR ANALYSIS)

Stakeholders	Intended/ unintended changes	Inputs		Outputs	Outcomes (What changes?)	Indicators	Source	Quantity	Financial Proxy	Financial Proxy	Source	Value Multiplier*	Value
		What will/do they invest?	Value £										
Who will we have an effect on? Who will have an effect on us?	What do we think changes for them? (From Perspective of organisation representatives)			Summary of activity in numbers	Description of the changes from the perspective of the stakeholders	Measurements of the outcomes	Where did we get the information?	How much change was there?	Unit value of financial proxy	What financial proxy did we use?	Where did we get the financial proxy?	Based on Respondents vs. Total Stakeholders (Where applicable)	What is the value of the change
Focus Stakeholder Group: Castledeurg/ Plumbridge Users and families	Affordable means of accessing town based services and appointments			Approx. 126 users of various frequencies	Affordable transport to urban centre for appointments, shopping	# of person miles travelled on bus where they would otherwise have to get a taxi or a lift from family/friend	Easilift data	10,800	£0.75	Difference of taxi cost per mile (£1) and bus cost (£0.25)	Easilift	N/A	£8,000
	Friendships and reduced sense of isolation				Increased social interaction for users when on the bus - who are otherwise isolated	Hours spent on bus engaging with others - 10,800 trips at 1 hour per trip	Easilift data	10,800	£3.00	Hourly value of social interaction time	Typical hourly cost of a leisure activity	N/A	£32,400
	Freed up time for family members not needing to escort user to town				Family/Friends not needing to sacrifice work time to escort user	Hours of time taken off to accompany service user (21% of respondents reported dependence on working family member)	Questionnaires	4,545	£13.84	Average hourly wage rate	www.payscale.com	3	£188,708
Stakeholder Financial Inputs:													
LTSBFNI		Funds	60,000										
Others		Funds	6,000										
Stakeholder Numbers													
Total													126
Number of responses from stakeholders													42
Value Multiplier*(Total/Responses)													3

* Value Multiplier is applied where an outcome quantity has been derived from the sub-set of stakeholders who provided responses to questionnaires/ interviews. The multiplier is the ratio of respondents to the total stakeholder group.

ORGANISATION ECF LINKS (3 YEAR ANALYSIS)

Stakeholders	Intended/ unintended changes	Inputs		Outputs	Outcomes (What changes?)	Indicators	Source	Quantity	Financial Proxy	Financial Proxy	Source	Value Multiplier*	Value
		What will/do they invest?	Value £										
Who will we have an effect on? Who will have an effect on us?	What do we think changes for them? (From Perspective of organisation representatives)			Summary of activity in numbers	Description of the changes from the perspective of the stakeholders	Measurements of the outcomes	Where did we get the information?	How much change was there?	Unit value of financial proxy	What financial proxy did we use?	Where did we get the financial proxy?	Based on Respondents vs. Total Stakeholders (Where applicable)	What is the value of the change
Focus Stakeholder Group: Diversionary Young People. Age Range 12 to 17	Less involvement in anti-social behaviour including alcohol and substance abuse				Less drinking	Young people reporting reduced spending on alcohol	Questionnaires	£14,789	Questionnaire data	Questionnaire data	Questionnaires	N/A	£14,789
	Social interaction and cross community understanding			576 hours diversionary activity	Less drug taking	Average reduction in money spent on drugs per year over 3 years	Questionnaires	£9,853	Questionnaire data	Questionnaire data	Questionnaires	N/A	£9,853
	Ability to have fun in safe space				Less anti social behaviour	Not quantified but deemed to be significant						N/A	
					Time spent in fun, safe setting engaging with peers from the "other community"	Hours in the programme	ECF Data	6,912	Value of leisure time per hour	Value of leisure time per hour	Typical cost of 1 hour at a leisure centre	N/A	£20,736
Financial Stakeholder Inputs:													
LTSBFNI		Funds	£2,850										
Others		Funds	£8,550										
Stakeholder Numbers													
Total													24
Number of responses from stakeholders													21
Value Multiplier*(Total/Responses)													1.14

* Value Multiplier is applied where an outcome quantity has been derived from the sub-set of stakeholders who provided responses to questionnaires/ interviews. The multiplier is the ratio of respondents to the total stakeholder group.

**ORGANISATION
EDUCATIONAL SHAKESPEARE COMPANY LTD (3 YEAR ANALYSIS)**

Stakeholders	Intended/unintended changes	Inputs		Outputs	Outcomes (What changes?)	Indicators	Source	Quantity	Financial Proxy	Financial Proxy	Source	Value Multiplier*	Value
		What will/do they invest?	Value £										
Who will we have an effect on? Who will have an effect on us?	What do we think changes for them? (From Perspective of organisation representatives)			Summary of activity in numbers	Description of the changes from the perspective of the stakeholders	Measurements of the outcomes	Where did we get the information?	How much change was there?	What financial proxy did we use?	Unit value of financial proxy	Where did we get the financial proxy?	Based on Respondents vs. Total Stakeholders (Where applicable)	What is the value of the change
Focus Stakeholder Group: Ex Offenders (and society)	Benefit to state of reduced reoffending			20 participants over past 3 years	Less reoffending reported, contrary to typical rates of reoffence from parallel group	Re-offences	ESC	2,952	Annual cost of imprisonment in NI applied over 1.5 year average	£138,750	ESC Data	2.86	£1,174,427
	Increased skills				Have learned new skills	# of participants reporting increased, employable skills	Questionnaires	7	Increased earning potential applied over 1.5 years average	£2,184	SROI Database	2.86	£43,724
	Improved outlook on life, hope, self confidence, more socially interactive				Increased self confidence and more social interaction	Increased self confidence	Questionnaires	7	Cost of self confidence course	£100	Belfast Met 2011 Part time Prospectus	2.86	£2,002
						More socially interactive	Questionnaires	7	Annual spend on social pursuits applied over 1.5 year average	£2,400	UK Statistics 2010	2.86	£48,048
Stakeholder Financial Inputs:													
LTSBFNI		Funds	£60,000										
Others		Funds	£60,500										
Stakeholder Numbers													
Total				20									
Number of responses from stakeholders				7									
Value Multiplier*(Total/Responses)				2.86									

*Value Multiplier is applied where an outcome quantity has been derived from the sub-set of stakeholders who provided responses to questionnaires/ interviews. The multiplier is the ratio of respondents to the total stakeholder group.

**ORGANISATION
FAST RURAL TRANSPORT (1 YEAR ANALYSIS)**

Stakeholders	Intended/unintended changes	Inputs		Outputs	Outcomes (What changes?)	Indicators	Source	Quantity	Financial Proxy	Financial Proxy	Source	Value Multiplier*	Value (PA)
		What will/do they invest?	Value £										
Who will we have an effect on? Who will have an effect on us?	What do we think changes for them? (From Perspective of organisation representatives)			Summary of activity in numbers	Description of the changes from the perspective of the stakeholders	Measurements of the outcomes	Where did we get the information?	How much change was there?	What financial proxy did we use?	Unit value of financial proxy	Where did we get the financial proxy?	Based on Respondents vs. Total Stakeholders (Where applicable)	What is the value of the change
Focus Stakeholder Group: Chit Chat Service Users	Continued independent living in own home			35 service users	Reduced social isolation and improved wellbeing through increased social interaction	Hours spent in telephone contact with FAST	FAST	675	National Average Wage	£13.84	www.payscale.com	N/A	£9,342
	Increased access to services and events via social car scheme			11,466 "person miles" of car/ bus journeys pa	Ability to attend events and appointments via facility of social car/ organised trip scheme	Hour spent in social interaction through FAST organised trips	FAST	2,013	Value of leisure time	£3.00	Typical cost of 1 hour at a leisure centre	N/A	£6,039
	Reduced social isolation/increased social interaction			2,013 hours spent in social interaction	Continued independent living and avoided hospitalisation, residential care	"Person miles" travelled	FAST	11,466	£1 per mile taxi cost less 55p paid by client	£0.45		N/A	£5,160
				675 hours telephone time per year		# of client incidents requiring hospitalisation, where early intervention reduced longer stay or more critical (2 falls, 1 stroke) outcomes	FAST	3	see note (1)			N/A	£0000
Stakeholder Financial Inputs:													
LTSBFNI		Funds	£13,000 pa										
Stakeholder Numbers													
Total				35									
Number of responses from stakeholders				28									
Value Multiplier*(Total/Responses)				1.25									

*Value Multiplier is applied where an outcome quantity has been derived from the sub-set of stakeholders who provided responses to questionnaires/ interviews. The multiplier is the ratio of respondents to the total stakeholder group.

(1) The value of such avoided outcomes could be significant, and range from a stay in hospital costing £000 per day to being admitted to full time residential care costing £0000 per year
For example:
The cost of permanent residential care without a care package - £986/week
Source -
Unit Costs of Health and Social Care 2010

ORGANISATION HOMESTART ANTRIM (1 YEAR ANALYSIS)

Stakeholders	Intended/unintended changes	Inputs		Outputs	Outcomes (What changes?)	Indicators	Source	Quantity	Financial Proxy	Financial Proxy	Source	Value Multiplier*	Value (PA)
		What will/do they invest?	Value £										
Who will we have an effect on? Who will have an effect on us?	What do we think changes for them? (From Perspective of organisation representatives)			Summary of activity in numbers	Description of the changes from the perspective of the stakeholders	Measurements of the outcomes	Where did we get the information?	How much change was there?	Unit value of financial proxy	Where did we get the financial proxy?	Based on Respondents vs. Total Stakeholders (Where applicable)	What is the value of the change	
Focus Stakeholder Group: Ballyclare and Toomebridge Families	Via Group Sessions, reduced isolation, more social interaction with peers			47 families Self-esteem Course	Reduced isolation and increased social interaction with peers	# of person hours of attendance at the weekly group events (4 hours, 40 weeks, 97 mothers and children)	Home Start	15,520	£3.00	Typical cost of 1 hour at a leisure centre	N/A	£46,560	
	Via Group Sessions, improved knowledge and awareness in areas of self esteem, sexual health, cooking			Alcohol Awareness Course Cooking Course Positive Parenting Course	For Home Visit families, the level of practical and emotional support provided	Hours spent on home visits	Home Start	2,070	£37.99	Unit Costs of Health and Social Care 2010	N/A	£78,639	
	Via Home Visits, same outcomes as above			2,070 hours Home Visits	Benefit reported from attending Home Start courses	# of courses attended	Questionnaires	22	£100.00	Belfast Met part time prospectus	1.15	£2,530	
Stakeholder Financial Inputs:													
LTSBFNI		Funds	£20,000 pa										
Others		Funds	£14,000 pa										
Stakeholder Numbers													
Total													47
Number of responses from stakeholders													41
Value Multiplier*(Total/Responses)													1.15

* Value Multiplier is applied where an outcome quantity has been derived from the sub-set of stakeholders who provided responses to questionnaires/ interviews. The multiplier is the ratio of respondents to the total stakeholder group.

ORGANISATION KIDS IN CONTROL (1 YEAR ANALYSIS)

Stakeholders	Intended/unintended changes	Inputs		Outputs	Outcomes (What changes?)	Indicators	Source	Quantity	Financial Proxy	Financial Proxy	Source	Value Multiplier*	Value (PA)
		What will/do they invest?	Value £										
Who will we have an effect on? Who will have an effect on us?	What do we think changes for them? (From Perspective of organisation representatives)			Summary of activity in numbers	Description of the changes from the perspective of the stakeholders	Measurements of the outcomes	Where did we get the information?	How much change was there?	Unit value of financial proxy	Where did we get the financial proxy?	Based on Respondents vs. Total Stakeholders (Where applicable)	What is the value of the change	
Focus Stakeholder Group: Box Of Stars Group (Feb 2009-Mar 2010) and carers where applicable. Age Range 13 to early 20's	Reduced isolation/increased social interaction. Increased independence.			17 participants	Increased skills More respite/free time for carers	Involvement in Box of Stars project - participants Hours of free up time	Questionnaires	9 1,660	£730 £3.00	Belfast Met Typical cost of 1 hour at leisure centre	1.9 1.9	£12,483 £9,462	
	Confidence and self esteem leading to involvement in more mainstream activities				Time spent in social interaction rather than isolation Progression into other activities - additional courses, employment	Participants reporting significant increase in social interaction Participants involved in follow on KIC projects	UK Statistics 2010	9	£1,660	Annual spend on social pursuits	1.9	£28,386	
	Improved physical wellbeing				Increased time spent in physical activity leading to reported health improvement	Hours spent in physical activity (hours)	Questionnaires	5 3 1,950	£730 £2,200 £5.93	Belfast Met Belfast Met www.direct.gov.uk	1.9 1.9 1.9	£6,935 £12,540 £21,971	
Stakeholder Financial Inputs:													
LTSBFNI		Funds	£9,755										
Others		Funds	£39,782										
Stakeholder Numbers													
Total													17
Number of responses from stakeholders													9
Value Multiplier*(Total/Responses)													1.9

* Value Multiplier is applied where an outcome quantity has been derived from the sub-set of stakeholders who provided responses to questionnaires/ interviews. The multiplier is the ratio of respondents to the total stakeholder group.

ORGANISATION KILKEEL PARISH BRIDGE ASSOCIATION (3 YEAR ANALYSIS)

Stakeholders	Intended/unintended changes	Inputs	Outputs	Outcomes (What changes?)	Indicators	Source	Quantity	Financial Proxy	Financial Proxy	Source	Value Multiplier*	Value (3 Years)
Who will we have an effect on? Who will have an effect on us?	What do we think changes for them? (From Perspective of organisation representatives)	What will/do they invest?	Value £	Summary of activity in numbers	Description of the changes from the perspective of the stakeholders	Where did we get the information?	How much change was there?	What financial proxy did we use?	Unit value of financial proxy	Where did we get the financial proxy?	Based on Respondents vs. Total Stakeholders (Where applicable)	What is the value of the change
Focus Stakeholder Group: After Schools Computer Club participants and families. Age Range 6-11	Head start on peers in IT, better performance in exams and ultimately better prospects		438 children	Increased competence and confidence in computer skills leading to better classroom performance see note (1)	# of hours at computer classes gaining new computer skills	Kilkeel PBA	14,945	Hourly cost of a child at primary school	£2.82	Dept. of Education 2010	N/A	£42,145
	Be able to use the Web safely and especially avoid social network risks		14,945 hours	Freed up time for 1 parent	# of hours freed up for 1 parent	Kilkeel PBA	14,945	Value of leisure time	£3.00	Value of 1 hour at a leisure centre	N/A	£44,835
	Increased cross community awareness, wider range friends, increased self confidence and better socialising skills and behaviour		160 qualifications	More friends and increased social skills	Not measured see note (2)						N/A	

Stakeholder Financial Inputs:

LTSBFNI	Funds	20,000
Fees charged for club membership	Funds	21,397
Other Funders	Funds	6,000

Stakeholder Numbers

Total	438
Number of responses from stakeholders	2 sets of focus groups at P3, P4, P5, P6, and P7 levels
Value Multiplier*(Total/Responses)	N/A

*Value Multiplier is Not Applicable

(1) Letters from 2 primary school teachers cite the Computer Club as providing the children and school with significant benefits:

A head start in relation to the computer related learning at school
Needing less adult input

The children being able to help/mentor their schoolmates

(2) Feedback from children focus groups reports the value of the club in increasing the participants' range of friendships. The social value of these friendships is beyond the scope of this analysis

ORGANISATION LEARMOUNT COMMUNITY DEVELOPMENT GROUP (1 YEAR ANALYSIS)

Stakeholders	Intended/unintended changes	Inputs	Outputs	Outcomes (What changes?)	Indicators	Source	Quantity	Financial Proxy	Financial Proxy	Source	Value Multiplier*	Value (PA)
Who will we have an effect on? Who will have an effect on us?	What do we think changes for them? (From Perspective of organisation representatives)	What will/do they invest?	Value £	Summary of activity in numbers	Description of the changes from the perspective of the stakeholders	Where did we get the information?	How much change was there?	What financial proxy did we use?	Unit value of financial proxy	Where did we get the financial proxy?	Based on Respondents vs. Total Stakeholders (Where applicable)	What is the value of the change
Focus Stakeholder Group: Good Morning and Befriending Service Users	Less social isolation - more socially interactive		20 recipients of Good Morning calls and 9 recipients of befriending service	Reduced feeling of isolation and increased access to community information	Contact time with Good Morning callers, befrienders and home visits - hours	Learmount Data	1,231	National Average Wage	£13.84	www.payscale.com	N/A	£7,037
	Being made aware of services		400+ hours of telephone contact time and 570 hours of befriending time	Less expenditure on home heating via Warm Homes Kits and increased safety through provision of Crime Prevention and Accident Kits	# of Warm Homes, Crime Prevention and Accident Kits provided	Learmount data	60	Estimated value £10 each	£10.00	Estimate	N/A	£600
			53 home visits per year	Improved ability to live independently	# of users reporting value of GM service in being able to stay independent	Questionnaires	4	see note (1)			N/A	
			Set of Crime Prevention, Warm Home and Accident Kits									

Stakeholder Financial Inputs:

LTSBFNI	Funds	£1,832 pa
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Stakeholder Numbers

Total	20
Number of responses from stakeholders	20
Value Multiplier*(Total/Responses)	1

*Value Multiplier is applied where an outcome quantity has been derived from the sub-set of stakeholders who provided responses to questionnaires/ interviews. The multiplier is the ratio of respondents to the total stakeholder group.

(1) There is insufficient data to determine the degree of relationship between the Good Morning service and the service users' continued ability to live independently. The ability to avoid living in residential care circumstances could have significant social value
e.g. The cost of permanent residential cost without a care package is £986 per week

Source - Unit Costs of Health and Social Care 2010

ORGANISATION REPLAY PRODUCTIONS (3 YEAR ANALYSIS)

Stakeholders	Intended/ unintended changes	Inputs	Outputs	Outcomes (What changes?)	Indicators	Source	Quantity	Financial Proxy	Financial Proxy	Source	Value Multiplier*	Value
Who will we have an effect on? Who will have an effect on us?	What do we think changes for them? (From Perspective of organisation representatives)	What will/do they invest?	Summary of activity in numbers	Description of the changes from the perspective of the stakeholders	Measurements of the outcomes	Where did we get the information?	How much change was there?	Unit value of financial proxy	What financial proxy did we use?	Where did we get the financial proxy?	Based on Respondents vs. Total Stakeholders (Where applicable)	What is the value of the change
Focus Stakeholder Group: The Write Now Group - 150 primary school children over 6 schools.	Increased self confidence and self esteem		150 Children 49 hours per child	Increased confidence and creativity	This was measured as "Loads", "A Bit", "Not At All" - see note (1)	Evaluation Workshop	see note (1)	See Note (1)	See Note (1)		N/A	
	Tolerance/Mutual Understanding/ Empathy			Improved social interaction	This was measured as "Loads", "A Bit", "Not At All" - see note (2)	Evaluation Workshop	see note (2)	See Note (2)	See Note (2)		N/A	
	Increased skills - literacy, numeracy, creativity			Increased curriculum related skills attained	Hours spent learning new skills	Replay	7,350	Hourly Cost of primary school attendance * 3 (see note 3)	Hourly Cost of primary school attendance * 3 (see note 3)	£8.48	N/A	£62,328

Stakeholder Financial Inputs:

LTSBFI	Funds	£11,038
Others	Funds	£3,788

Stakeholder Numbers

Total	150
Number of responses from stakeholders	82
Value Multiplier*(Total/Responses)	1.83

*Value Multiplier is applied where an outcome quantity has been derived from the sub-set of stakeholders who provided responses to questionnaires/ interviews. The multiplier is the ratio of respondents to the total stakeholder group.

(1) Results were 30% A Lot, 50% A Bit, 20% Not At All

The value of these results would require a more comprehensive method of measurement and valuing

(2) Results were 51% A Lot, 45% A Bit, 4% Not At All

The value of these results would require a more comprehensive method of measurement and valuing

(3) Teachers reported that it takes them

3 hours to achieve curriculum building skills in literacy, numeracy and creativity against one hour that Replay Productions would take in an engagement with a child in similar curriculum building skills.

An hourly rate is derived from Department of Education term costs of £1,100 for achievements of building these core skill-sets in literacy, numeracy and creativity (assuming 6 hours per day over a 13 week term).



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