



Social Return on Investment Report

Ashram Employment and Skills Service

July 2012

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This report has been submitted to an independent assurance assessment carried out by The SROI Network. The report shows a good understanding of the SROI process and complies with SROI principles. Assurance here does not include verification of stakeholder engagement, data and calculations. It is a principles-based assessment of the final report.



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1. Executive summary

1.1 Introduction

This is a Social Return on Investment (SROI) report on the Employment and Skills Service run by Ashram Housing Association. Ashram Housing Association is based in the West Midlands and is one of the six housing associations that make up the Accord Housing Group. Ashram provides homes and services to the region's poorest households and neighbourhoods, with a strong foothold in the heart of East Birmingham where typically high rates of worklessness and benefit dependency permeate. Tenant profiling indicates that only 22% of Ashram's tenants are economically active (Ashram's 2009 Status Satisfaction Survey).

1.2 Worklessness and labour market disadvantage

Ashram's tenant profile is not unique and mirrors the prevalence of worklessness rates and labour market disadvantage that is disproportionately higher amongst social housing tenants. Figures indicate that up to 3.5 million residents of working age are not in work, which equates to 56% of those of working age living in social housing. An ongoing interplay of growing unemployment levels and welfare reform changes will continue to push those with lower level skills and limited work experience further away from the labour market putting more pressure on working age residents to find a job.

1.3 Employment and Skills Service

In 2011, Ashram launched its Employment and Skills Service to provide a unique service offering personalised, outcome focused one-to-one pre-employment support to help tenants to move along their journey to work. The service has been a success, supporting 53 clients in its first year including eight people who have moved into paid employment. Whilst laudable outputs have been derived Ashram felt that to position the service for future business growth and viability the key was to better understand the Employment and Skills Service's impact and achievements. This was the basis for undertaking an SROI analysis.

Ashram also saw opportunities to support the work of HACT, Inclusion and the 88% of social housing providers who significantly invest in worklessness initiatives but struggle to measure the impact and value of this investment¹. Hence as a direct outcome of this study we would suggest that the SROI framework might offer the social housing sector an impact assessment tool which can successfully measure and assess the value of the social, economic and environmental outcomes created by worklessness interventions both by provider and across the wider sector as a whole. Housing providers have the potential to be the micro-engines for economic recovery across the UK's cities, towns and neighbourhoods. Through this SROI analysis and others like it Ashram can start to articulate this potential and communicate the difference they are already making in a language that makes sense to a much wider audience.

1.4 The Social Return on Investment

SROI is a measurement approach that helps organisations to demonstrate and understand the social, environmental and economic value that they are creating. It is informed by real people's experiences, and the things that make a difference to the lives of those directly involved and affected.

This SROI analysis shows that Ashram's Employment and Skills Service has been highly effective and created social value for each of its stakeholder groups. The analysis shows that the service received funding of £36,689 for the period April 2011 – February 2012. Based on rigorous research and best assumptions, this report estimates a Social Return on Investment of £5.19 : £1.

¹ Gardiner L, Simmonds D, (2012) Housing providers' approaches to tackling worklessness: Assessing value and impact, HACT and Centre for Economic and Social Inclusion

In other words this is a service that has the potential to generate positive social, environmental and economic outcomes that are worth over five times the investment required to achieve them.

1.5 Conclusions

In relation to the Employment and Skills Service, the SROI report concludes that:

- Personalised, flexible one-to-one support is greatly valued by service users and is the key to success. The ability of the Coach to build rapport and establish relationships based on trust is integral to the success of the overall service.
- Creating job opportunities for Ashram's tenants is key and is likely to have the greatest impact on the overall social return on investment. Continuing to develop linkages between the service and the AddVentures agency is critical.
- Prioritisation of clients – there is an opportunity to refine the service in order for it to achieve maximum impact. This could be done through a more targeted approach prioritising the needs of unemployed clients over individuals wanting to develop their skills and career pathway.
- Scaling up through frontline delivery would need to be carefully planned and managed to ensure effective delivery of the service to a wider group of service users and sufficient capacity and training being available for frontline workers.

In relation to the wider Accord Group, the SROI report concludes that:

- The SROI framework can provide an excellent project management cum business development tool which can be used when designing and planning for a new project or service. Most recently this approach has been used as part of a successful Big Lottery funding bid.
- Stakeholders input is central to the SROI methodology and could indicate a revolution in how the Accord Group develop and maintain future customer relationships.
- The SROI framework has the potential to help the Group develop a richer evidence base for projects and services. It will enable the Group to better track and measure social and environmental impact so this can be converted into financial data.
- A robust and detailed SROI evaluation requires access to robust data and intelligence whether that applies to project outputs, budgets, or most importantly the beneficiaries.

1.6 The future

Ashram and the wider Accord Group have a distinguished offer to make to a number of central stakeholders such as Government, Job Centre Plus and work programme prime contractors. This is an offer which is being strengthened through the work of the dedicated group-wide enterprise and employment agency AddVentures. The Accord Group is already examining its procurement power to identify opportunities within supplier chains to capitalise and establish increased employment, enterprise and training opportunities. The impact of this approach will continue to be measured in SROI terms.

Ashram believes its landlord and tenant relationship allows for a connectivity which can seed familiarity and trust. Such a relationship cannot easily be replicated by other statutory and non-statutory employment and skills service providers. This 'connectivity' coupled with Ashram's tenant profile demonstrates the value of offering personalised pre-employment support as a way of engaging with those furthest away from the labour market to gear them up for their journey. Ashram recognises that

the very foundation needs start with confidence building and nurturing aspirations from which sustainable skills and employment opportunities can then be anchored.

Ashram's Employment and Skills Service operates in a very complex arena characterised by the interplay of many services and agencies. This SROI analysis highlights the positive difference Ashram's Employment and Skills Service can make, and going forward there is the potential and opportunity for Ashram to play an extended and valuable role in this arena.

2. Introduction

This report focuses on the impact of Ashram Housing Association's Employment and Skills Service. Ashram is one of six housing associations that make up the Accord Group, a partnership of organisations that provide 11,000 affordable homes and services, including health and social care, to 50,000 people across the Midlands and beyond. It is a not-for-profit organisation and one of the largest housing groups in the Midlands, with 4,200 employees and an annual turnover, including new developments, of circa £100 million.

Following intensive training on the SROI methodology we have used the SROI framework to understand and analyse the value of the social, economic and environmental outcomes created by Ashram's Employment and Skills Service.

Being able to understand and communicate the Employment and Skills Service's effectiveness and achievements is fundamental, particularly in light of recent research undertaken by HACT and the Centre for Economic and Social Inclusion². HACT conducted an assessment of the impact and value of the housing sector in terms of its approaches to tackling worklessness. A key finding of the survey was that whilst there had been significant investment with up to 88% of housing providers resourcing employment and skills initiatives, only 45% of those providers held up to date information about the status of their residents. This highlights the real challenges housing providers face in how to best evidence and communicate their impact, ideally using a common established approach to defining, measuring and assessing worklessness interventions.

For Ashram and the Group this type of evaluation is the first of its kind and it has allowed the practical test-bedding of the widely acclaimed SROI methodology. Going forward we hope that the SROI approach might lend itself to becoming the Group's preferred impact assessment tool. This report includes recommendations relating to both the Employment and Skills Service and to the Accord Group in terms of future impact measurement and embedding SROI principles more widely.

This report presents a retrospective view of the social return created by Ashram's Employment and Skills Service activities for April 2011 – Feb 2012. The Employment Service aims to provide a dedicated one-to-one employment and coaching service to Ashram's general needs tenants and the wider community where it operates and thus contribute to residents' quality of life.

² Gardiner L, Simmonds D, (2012) Housing providers' approaches to tackling worklessness: Assessing value and impact, HACT and Centre for Economic and Social Inclusion, 2012

3. Methodology

3.1 SROI principles and key stages

This evaluation report examines the difference made and the social value created by Ashram Housing Association's Employment and Skills Service. Our SROI evaluation has been produced following the SROI Network's guidance and it adheres to the following principles:

- involvement of stakeholders
- a focus on understanding what changes
- valuing the things that matter
- including only things that are material
- avoiding over-claiming
- transparency
- verification of the result.

Carrying out an SROI analysis involves the following six stages:

1. **Establishing scope and identifying key stakeholders:** It is important to have clear boundaries about what your SROI analysis will cover, who will be involved in the process and how.
2. **Mapping outcomes:** Through engaging with your stakeholders you will develop an impact map, or theory of change, 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 valuing them.
4. **Establishing impact:** Having collected evidence on outcomes and monetised them, those aspects of change that would have happened anyway or are a result of other factors are eliminated from consideration.
5. **Calculating the SROI:** This stage involves adding up all the benefits, subtracting any negatives and comparing the result to the investment. This is also where the sensitivity of results can be tested.
6. **Reporting, using and embedding:** Easily forgotten, this vital last step involves sharing findings with stakeholders and responding to them, embedding good outcomes processes and verification of the report.

3.2 Team approach and learning

This study has been led and written up by an individual but the research and analysis stages have involved members of a small team from within the Accord Group. Working as part of a small SROI team has made the process more robust as team members have discussed, challenged and as a group decided on the way forward for each step of the process. No decision has been taken lightly.

Undertaking an SROI analysis is a time intensive exercise. Working through the six stages methodically is crucial and there has been a commitment to record each stage of the process. The team's experience has underlined the following:

- Clearly defining the purpose of the project from the outset is absolutely crucial.
- It is important to record and evidence every decision and assumption made at each stage of the SROI analysis. Recording this at the time speeds up the final report writing stage and means that the team can look back and justify how the analysis has progressed.

- Setting realistic timescales for any analysis is vital. In order to conduct a robust, thorough and meaningful SROI analysis, to be true to the process and to involve stakeholders at all the key stages, it is important to allow enough time. The amount of time will vary depending on each individual project and where there is already monitoring and data collection taking place the process is likely to be more straight forward. Once an understanding of the scope of the project has been gained, an estimate on the timescale can be given.
- It is important to ask the right questions when gathering stakeholder information. Although feedback has always been sought and stakeholders surveyed, the right questions have not always been asked. Conducting this SROI analysis has helped the team to look critically at what answers are needed and how the responses to questions can be useful in informing us. In the future we will take much more care in how we put questions to stakeholders, and who we ask, so that the responses have a better chance of offering quantifiable opinions. Many of these questions can be included as part of routine reviews and follow-ups, making the collection of information easier.
- As a by-product of carrying out an SROI analysis the team members conducting the analysis develop a detailed understanding of the existing monitoring systems. This in turn can lead to the formation of recommendations for improvements to these systems. In respect of the Employment and Skills Service, the monitoring system is fairly robust and well managed. However this analysis will prompt a review of the systems to ensure that going forward they are fit for purpose.

3.3 Research limitations

SROI is still a fairly new framework. It measures and accounts for a much broader concept of value, through measuring change in ways that are relevant to the people or organisations that experience or contribute to it. It is about value rather than money. There are however limitations with the methodology, many of which are being addressed by the SROI Network and will be overcome as SROI becomes more widely used with a more established evidence base.

The framework and guidance provided by the SROI Network aim for rigour but there remains a degree of space for personal judgement. Adopting a team approach to conducting the analysis has reduced this risk as every decision and assumption made has been challenged and agreed by a number of individuals all of whom have undertaken intensive SROI training.

One of the main perceived limitations of SROI, as with other types of evaluation, is that it is difficult to compare results between organisations. This is in light of the space for personal judgement which could make it possible to inflate the value created. There are auditing tools and procedures which help to standardise the way SROI ratios are calculated but to a certain degree the process of producing an SROI ratio is specific to every organisation. Therefore it is vital that the overall SROI ratio should not be viewed in isolation. The analysis that accompanies the SROI ratio is crucial as it ensures transparency and makes it possible to see some of the choices that have been made about what to measure and how to value an impact. SROI should not be viewed as being all about the final financial ratio. This attracts scepticism and criticism and means many of its benefits are overlooked. SROI is a process of understanding and valuing impact and should be used by organisations to understand where their impact is greatest and how they could improve what they do.

Attributing monetary values to outcomes has been perceived by some to be problematic. Although the basic principle of needing to measure 'apples with apples' is obvious, there are many that argue that putting a monetary value (proxies) on some of the soft outcomes (increased confidence and self-esteem etc) involves an element of guesswork that could be open to misuse. Supporters of SROI would argue that adherence to the SROI principles will address this criticism. Furthermore The SROI Network is addressing these limitations through building up a database of acceptable and acknowledged values, outcomes and indicators, which have been used in assured SROI analyses. Careful research, referring to existing and accepted evidence bases and adhering to the SROI principles is vital in order to conduct a robust, credible and true analysis.

4. Background and context

4.1 Ashram Housing Association

Ashram is a West Midlands housing association that provides community-inspired housing and services and is an agency for social inclusion and social impact, developing person-centred services to meet people's needs, choices and aspirations. Based in Tyseley, Birmingham, the organisation was founded to meet the needs of South Asian communities living in the Midlands. However, Ashram recognised the social importance of moving from being a specialist black and minority ethnic provider to a mainstream organisation and it now also serves, supports and empowers a diverse cross section of communities.

Ashram provides homes and services to some of the region's poorest communities and as expected this is reflected in the tenant demography. There are high rates of unemployment, entrenched worklessness and benefit dependency. Factors such as poor health, low educational attainment and low skill levels prevail and entwine to create multiple disadvantages for individuals and their wider households. A mistrust of institutions can also feature which further complicates tenants' circumstances and removes them even further away from the labour market.

4.2 Worklessness and labour market disadvantage

Worklessness and labour market disadvantage amongst social housing tenants is well documented in the UK with 3.5 million residents of working age not in work, which equates to 56% of those of working age living in social housing. This is deemed a disproportionate effect when you consider much lower workless levels contained within the private and owner-occupier sectors. Entrenched worklessness also becomes apparent when you consider that nearly half of those workless social housing tenants have not worked for at least 12 months.

For Ashram its stock portfolio is predominantly located in areas classed as the 10% most deprived areas nationally, therefore Ashram must assume a high level of unemployment and worklessness amongst its working age residents and a commensurate dependency on state benefits. Evidence from questionnaires, workshops, interviews and housing officer caseloads throughout a six month review of employment and enterprise services support this assumption. This includes the 2009 Status Satisfaction Survey which found that only 21% of Ashram tenants were economically active.

The Status Survey also revealed that almost seven out of ten (68%) of tenants stated the importance of obtaining employment, and of those in work 65% wanted a more interesting job. Furthermore almost three-quarters of people stated that higher income and greater financial security was important to them and their families.

High unemployment levels will continue to push those with lower level skills and limited work experience further away from the labour market with welfare reforms putting more pressure on working age residents to find a job. Many of these residents will have been out of work for some time and will have few networks, low job search skills and limited experience of the workplace. Negative attitudes and behaviours are quickly established and a culture of worklessness can develop within families – affecting young peoples' attitudes to education and work.

Ashram believes its landlord and tenant relationship allows for a connectivity which can seed familiarity and trust. Such a relationship cannot easily be replicated by other statutory and non-statutory employment and skills service providers. This 'connectivity' coupled with Ashram's tenant profile demonstrates the value of offering personalised pre-employment support as way of engaging with those furthest away from the labour market to gear them up for their journey. Ashram recognises that the very foundation needs start with confidence building and nurturing aspirations from which sustainable skills and employment opportunities can then be anchored.

4.3 Background to the Employment and Skills Service

During 2010-11 Ashram, in partnership with Midland Heart, St Basils, Crossmatch Solutions and the Jericho Foundation, launched the 'Roots to Work' project funded by the Working Neighbourhoods Fund. The project was introduced to work with unemployed homeless people across the city with 25% of those participants being defined as NEET's. The project engaged with a total of 265 people who were all supported with one-to-one job coaching to help them to access training and job opportunities.

In April 2011, following the success of the 'Roots to Work' project Ashram made the decision to continue providing a dedicated Employment and Skills Service to all of its tenants and those living in the wider community. This service is particularly important to Ashram as it signalled the emergence of Ashram's 'pathways' model. Ashram's 'pathways' model moves beyond the traditional housing offer to seed the foundations of a holistic person-centred approach. The model addresses the wider needs of tenants due to the multiple barriers they experience; such as long-term unemployment, low income, health issues and low self-esteem, which when combined severely limit an individual's potential for social mobilisation. Ultimately, Ashram aims to offer every tenant an integrated personal support package to examine and meet their individual holistic needs, talents and aspirations. Specific support strands feature as dedicated pathways from housing and accommodation through to specialist interventions such as training and employment, finance and benefit advice and health and social care.

The Employment and Skills Service offers tailored one-to-one coaching, drop in surgeries, training and group workshops to help residents move along their journey to work. The service is open to any of Ashram's tenants and provides the personalised support of a dedicated Employment Coach. The Employment Coach can support tenants with finding work experience, accessing training opportunities, creating or editing CVs, completing job searches or practicing interview techniques.

4.4 First year of delivery

It is important to note that during the first year of delivery the service has been devoid of KPI measures. This has been purposely done to allow for enhanced flexibility and freedom to test out a new offer to Ashram's tenants and is compliant with a coaching approach where support solutions will differ depending on each client's needs and aspirations.

In its first year the Employment and Skills Service received 66 referrals, of which 53 progressed onto an initial assessment meeting and engagement with the service. This did mean that 13 people who were referred to the service were never successfully engaged with. This was due to reasons such as clients no longer being interested in support, or contact never being established. The service also runs a waiting list which at its highest has had five clients. These figures mean that the service on average is receiving six referrals a month. Once you take into account those who have failed to engage with the service, this still means the service has been successfully engaging with nearly five new clients each month for the year it has been operational with very little ongoing marketing.

In its first year the service engaged with a wide range of residents, from all sections of society. The service was accessed most often by people in the 20 – 29 age range, but was also accessed by four people aged 16 – 20 and five people aged over 50, and was utilised by both long term unemployed and also those unemployed for less than three months. The service was accessed by individuals from a wide range of ethnic groups with 40 out of the 56 clients being from an ethnic minority group, and only 16 being white British. The service was accessed by both men and women, however the majority of the clients were female, with 37 females accessing the service compared to 19 men. For further information see the charts below (Fig 1).

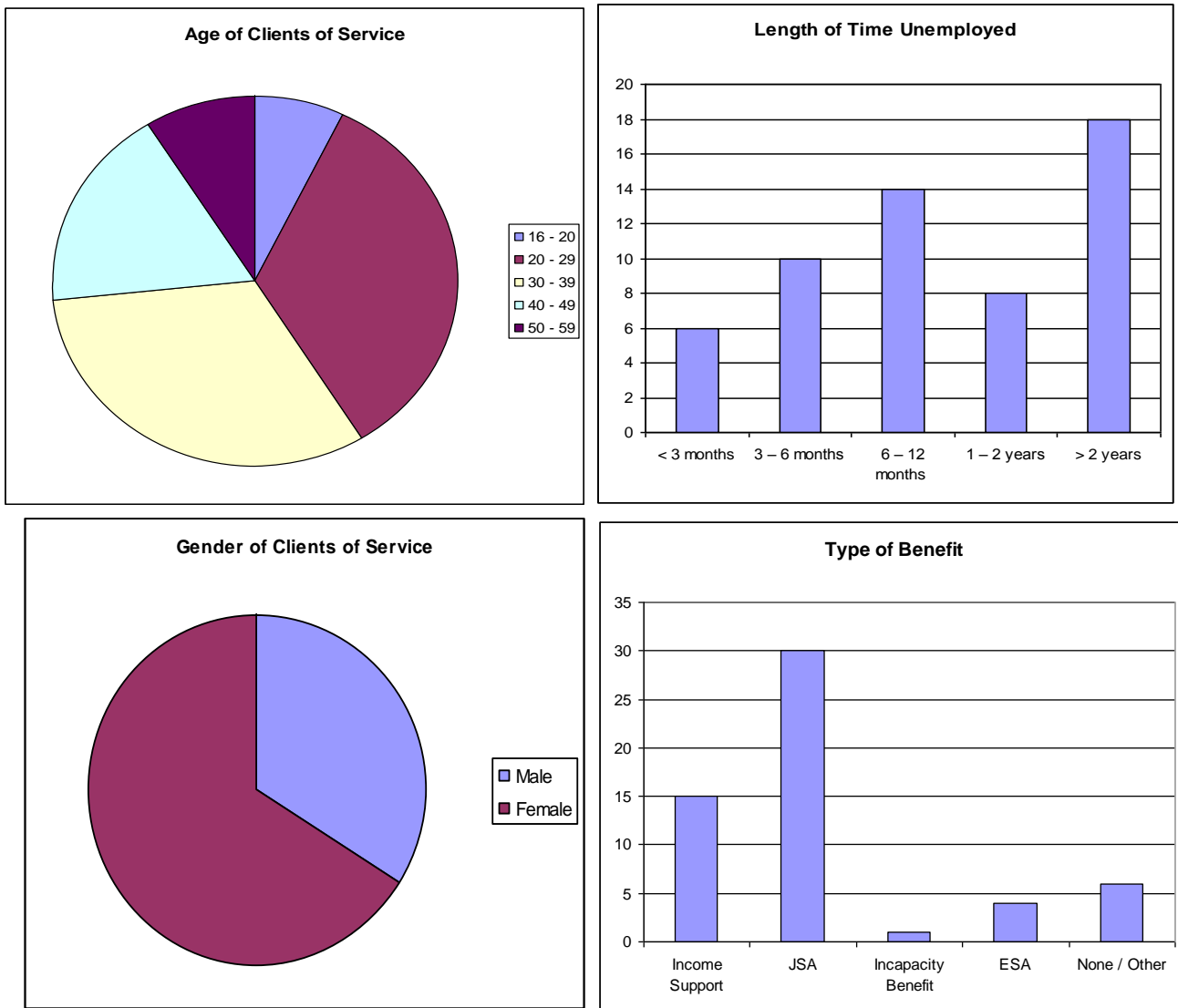


Fig 1: Summary of client groups

4.5 SROI scope

The Employment Service aims to provide a dedicated one-to-one employment and coaching service to Ashram's general needs tenants and the wider community where it operates and thus contribute to residents' quality of life. The following points set out the scope of the SROI analysis:

- This is an evaluative SROI analysis, as this report looks at activities and changes that have already occurred to understand the value for money of Ashram's Employment and Skills Service.
- This report looks at the social return created by Ashram's Employment and Skills Service activities for April 2011 – Feb 2012. The investment period and measurement period relate to this timescale.
- Data collection took place from February 2012 based on service user questionnaires, telephone interviews and a representative sample of individuals who attended facilitated workshops. During this period we also engaged with and gathered information from a number of representatives from Ashram Housing Association, the landlord, and the wider Accord Group.

4.6 Materiality

One of the principles of SROI is to only include what is material. The principle states:

‘Determine what information and evidence must be included in the accounts to give a true and fair picture, such that stakeholders can draw reasonable conclusions about impact’³.

According to the SROI Network, materiality involves ‘an assessment of whether a person would make a different decision about the activity if a particular piece of information was excluded. This covers decisions about which stakeholders experience significant change, as well as the information about the outcomes.’⁴ The decisions to include or exclude different stakeholders or outcomes involve questioning both the relevance and the significance of these elements to the SROI analysis.

In terms of an SROI analysis, the relevance aspect is considered as part of Stage 2 - Understanding change. This relates to identifying and involving stakeholders and developing and refining outcomes with them. The result is a list of stakeholders and outcomes. It is important that no stakeholders are missed out and that the outcomes taken forward are correct and complete. Once this has been done the relevance of outcomes should be addressed.

In terms of stakeholders:

Initially a long list of stakeholders was considered for inclusion in the analysis. This was worked up to begin with by the four staff members involved in the research stage of this analysis and was developed through detailed discussions with the Employment and Skills Coach, landlord and service users. Table 1 (page 15) indicates the decisions taken on whether to include or exclude stakeholders based on the relevance of the intervention to the stakeholder as well as the significance of the change they experience. Exclusion from the analysis was usually based on the indirect relevance of the intervention as well as the low level of significance of the potential change to the stakeholder in question. For the family and friends of service users stakeholder group we initially thought this group may experience significant change. However, the subsequent research we conducted showed that although some individuals experienced slight change, this was not deemed to be significant or occurring across a sufficient number of the larger population of this stakeholder group. We did not find evidence of significant impact on this stakeholder.

In terms of outcomes

Similarly to the list of stakeholders, an initial list of potential outcomes was created based on research by the staff working on this analysis, professional expertise, questionnaires, telephone interviews, specific SROI workshops, interviews with key representatives from the landlord and Employment and Skills Coach and service materials (such as the existing Theory of Change / logic model). As the analysis proceeded outcomes were developed in conjunction with and verified by stakeholders (notably through the service user workshops and landlord interviews). For some stakeholders, outcomes which were put forward earlier on in the analysis were dropped and eventually excluded based on their relevance to the stakeholder as well as their significance in terms of quantity, value and impact. These decisions are explained in Table 3 (page 25). Some of the outcomes which were suggested early on in the analysis were for stakeholder groups which were subsequently excluded from the analysis as a result of them not experiencing significant change. An example is the family and friends stakeholder group. During initial discussions (before engagement with service users or family and friends of service users themselves) potential outcomes around the positive impact on relationships with family and friends and increased income for households were put forward. However after engaging with this stakeholder group we did not find evidence of significant impact on this stakeholder group and therefore the proposed outcomes and this stakeholder group were excluded from the analysis.

SROI requires that the outcomes identified are valued and that an assessment of impact, for example in terms of deadweight and attribution, is carried out in order to reduce the risk of over claiming. Section 7

³ The SROI Network, Supplementary Guidance on Materiality, Version 4, November 2011

⁴ The SROI Network, Supplementary Guidance on Materiality, Version 4, November 2011

in this report (page 30) focuses on evidencing and measuring outcomes in order to understand the extent to which change has occurred. Section 8 (page 43) explains all decisions made in relation to impact. At all stages throughout this analysis we have aimed to evidence our assumptions and explain the rationale behind our decision making so as to ensure the robustness and credibility of our approach. From the explanations included in this report it should be possible for readers to interpret and assess the decisions made on materiality.

5. Stakeholders

5.1 Stakeholders involvement in the SROI process

It is recommended that stakeholders are involved in the following stages of the SROI process.

- **Development of the impact map** – by involving stakeholders in this stage you ensure that the outcomes that matter to those affected get measured and valued.

Early on in this SROI analysis, questionnaires were sent out to all Employment and Skills service users to gather information on the services and support they were accessing, the support received from the Employment and Skills Coach and their progression post engagement. This along with input from the Employment and Skills Coach provided us with background information from which we developed our initial impact map. We then verified and added to this information through telephone interviews, service user workshops and additional questionnaires.

- **Describing outcomes** – describing the change that takes place, and checking that our view of intended and unintended changes is correct.

We emailed key questions to stakeholders (the landlord, Employment and Skills Coach and support workers) to inform the outcomes which we included in the impact map. For service users we used information which was gathered through questionnaire responses and telephone interviews and subsequently checked and refined this at service users workshops.

- **Developing outcome indicators** – stakeholders are often the best people to help identify indicators – we need to ask how they know the change has happened for them.

We worked closely with the Employment and Skills Coach to develop outcome indicators for service users. We introduced the concept of indicators and broadly discussed them at the service user workshops. We received email responses to key questions from the landlord which informed our choices of indicators used in the impact map.

- **Collecting outcomes data** - collect data on your indicators – usually from project participants.

This was done through a variety of methods including two specific service user workshops (gathering data on increased confidence of service users), questionnaires completed as part of the workshops, information already held by the Employment and Skills Coach (including details on clients who had accessed various services offered and their feedback on these, details on clients who had moved into work, number of clients who felt the support they have received has helped them progress towards employment, Outcomes Star results for clients in terms of development of job specific skills) and information gathered from the landlord around rent arrears and levels of publicity.

- **Identifying financial proxies** – only stakeholders know what it is they value and how it might best be captured. Whilst they not be able to identify a tangible value, they can guide you as to what the change is worth to them.

Financial approximations of value are required to value the things that matter to stakeholders and are one of the seven principles of SROI. For the service users we used proxies based on the information gathered at the service user workshops and through interviews with Accord staff and local employers to reflect the value service users placed on the changes they were experiencing. We were able to develop specific financial proxies for the landlord taking into account organisational data held on division of staff time according to tasks and salary information. For the outcomes relating to the state we carried out background research and as

our outcomes for the state were similar to those used in other related SROI reports we opted to refer to and where appropriate develop financial proxies which had been used by nef and others in assured SROI reports and were available from the SROI VOIS database.

- **Deadweight and displacement and attribution**

Ask stakeholders what other services they access and how helpful they are / or is there a similar facility in the area? What percentage of the outcome is a result of our activity?

The two workshops we ran included specific interactive activities which focused on drawing out information from service users to inform our assignment of values of deadweight, displacement and attribution. This was in addition to research we carried out into existing SROI reports focusing on similar issues and secondary data gathered by third party sources to ensure the validity of the figures used in this analysis.

5.2 Identifying stakeholders

As explained in section 4.6 (page 12), materiality in SROI is used to determine what information and evidence must be included in the accounts to give a true and fair picture, such that readers can draw reasonable conclusions about impact⁵. The table below presents the rationale for including or excluding Ashram's Employment and Skills Service stakeholders according to the principle of materiality.

This covers decisions about which stakeholders experience significant change as well as the information about the outcomes (both positive and negative). Where stakeholders are excluded in the table below we would not expect material outcomes to occur. The exception is for Support Workers and clients of Support Workers who are receiving employment and skills support following training given to Support Workers by the Employment and Skills Coach. This has been a recent evolution of the Employment and Skills Service and no information on this aspect of the service has yet been captured. This development will only have had an impact for the final two months of the period being analysed so we would not expect significant material outcomes to have been generated in this time.

Through consultation with the landlord, the Employment and Skills Coach and individual service users we identified the following stakeholders:

Key Stakeholders	Materiality	Rationale
Tenants / service users	Included	Primary beneficiaries of the service. Likely to be experiencing significant outcomes if intervention is successful.
Ashram (the landlord)	Included	Key stakeholder that experiences significant change - they directly invest in the delivery of this service so it is important that we understand the level of SROI for the organisation to help inform its future design and delivery to achieve maximum impact.
The State (in terms of central government – DWP and HMRC)	Included	Key stakeholder that experiences significant change - potential for reduction in benefit payments and increased state income from taxes where people are successfully supported into paid work.
Family and friends of service user	Excluded	During our initial discussions and before engaging with stakeholders we listed family and friends of service users as a potential stakeholder. After having explored the changes that this group experienced as a direct result of the service, we have concluded that the changes they experience are not significant enough and not widespread enough amongst the wider population of family and friends to include in this analysis. The information we have gathered is however useful in providing an insight into the variety of ways in which the service has the potential to impact on family and friends of service users. As a result of this analysis we will be collecting more data and building up more evidence of the ways in which

⁵ Nicholls J, Lawlor E, Nietzert E, Goodspeed T (2009) A Guide to Social Return on Investment (London: The Cabinet Office) p97.

		and degree to which the service impacts on this stakeholder group.
Senior Employment & Skills Coach (employee)	Excluded	Often staff are not considered material in SROI analyses because they are neither primary nor secondary beneficiaries of the organisation's work. The Employment and Skills Coach was not included in this SROI analysis. In retrospect we would have engaged with the Employment and Skills Coach specifically around changes they as an individual experienced to ascertain whether they should be included as a stakeholder. We discussed changes around well-being and job satisfaction but as these emerged much later as the process evolved and the impact was likely to be small the decision was taken not to go back and include the Coach as a stakeholder. In addition SROI experience shows that workers delivering an intervention would have likely experienced the same outcome in similar employment without the intervention. ⁶
Support Workers	Excluded (but would be included in future analyses)	Support Workers have been trained by the service to offer basic employment and skills support to their clients. Although Support Workers engage and refer with the clients, this is a recent development that has only been the case for a few months. It was therefore decided that they would not be included as a key stakeholder although we do anticipate that they will experience material benefits. Information is not currently captured on this stakeholder - but will be gathered in the future and we would include support workers as a stakeholder in future analyses of the service.
Clients of Support Workers	Excluded (but would be included in future analyses)	Also beneficiaries of the service but excluded for same reasons as above. Likely to be experiencing significant outcomes if intervention is successful. Information is not currently captured relating to clients of support workers as this is a recent development whereby Support Workers have been trained in offering basic employment and skills support. Clients of Support Workers are therefore not included in this analysis.
Local community (residents and business)	Excluded	There are some benefits to the community in terms of more income being generated. However the size of these benefits compared to the overall impact is likely to be small and it is not within the resources of this evaluation to measure these.
Job Centre Plus	Excluded	Although a number of additional agencies and support groups had direct or indirect contact with the service users, the team did not have sufficient capacity to consult with them all and the outcomes reported by our stakeholders did not identify these groups as experiencing the key changes. We have excluded these stakeholders as we did not capture this information during the period in question but we would look to investigate the changes experienced by these groups more fully in future SROI analyses of this service. The outcomes that clients using the service achieve could free up Job Centre Plus and Single Work Programme contractors workloads, supporting them to hit their targets of moving people off out-of-work benefits
Single Work Programme contractors		
External Support Agencies		

Table 1: Identifying stakeholders

As indicated in the table above we identified the following stakeholders who are directly affected by the Employment and Skills Service to be included in this analysis.

1. Service users (those directly supported by the Senior Employment and Skills Coach),
2. Ashram Housing Association (landlord)
3. The State. In this analysis we have defined 'the State' as central government and as including both the Department for Work and Pensions (DWP) in terms of their responsibility for welfare payments and HM Revenue and Customs (HMRC) in terms of their roles relating to the payment and administering of taxes (including collection of income tax, national insurance and payment of tax credits).

We also identified a number of other stakeholders who may experience change as a result of the Employment and Skills Service but who have not been included in the analysis. The reasons for these

⁶ Catalysts for Community Action and Investment: A Social Return on Investment analysis of community development work based on a common outcomes framework (2010) nef consulting

exclusions are explained in Table 1 above and below we explain in more detail our rationale for not including family and friends of service users as a stakeholder in this analysis.

Where stakeholders have been excluded this does not mean that they are unimportant, rather that the change they experience is either not material to this analysis or is not significant in SROI terms. Some stakeholders are excluded from the analysis because they fall outside the scope of what is considered material and this is the case for family and friends of the service users. This means that any change they experience is either not relevant to the work being evaluated, or that its impact is not significant.

To explore the changes experienced by family and friends of service users we conducted an initial six telephone interviews with family and friends of individuals who are currently clients of the Employment and Skills Service. We approached a randomly selected sample of service users and after explaining the background to our research we asked whether they would be happy for us to speak to a family member or friend who may experience change as a result of their engagement with the service.

This process along with information we already held and detailed discussions with the Employment and Skills Coach provided us with an insight into the family make-up and living situations of the service users as well as providing us with an indication of whether material change was experienced across this stakeholder group. The vast majority of service users are single and fall into the 20-40 year old age bracket. More are female than male, many are single parents with young children and most live alone (or with their children) but independently of immediate family. It is likely that these trends have an impact on the level of change being experienced by family and friends. Since family (aside from offspring) tend not to be living with the service user they do not seem to experience significant change as a result of their engagement with the service. In terms of the impact on friends, no service users mentioned the impact on their friends of them using the service, and no individuals spoke of this impact when we asked them more specifically at the first stage of the telephone interviews.

When interviewed some family members spoke about the increase in confidence and wellbeing of service users since engaging with the Employment and Skills Service, but the benefit here accrues to the individual rather than to the family and friends of the individual.

“My family has noticed an increase in my self confidence levels which has lessened their concern for my wellbeing.” Service user

One family member spoke about the potential for increased income in the household and the positive role model for children, but this was not reflected by other interviewees and is not likely to have been experienced across a large percentage of service users’ family members because of the trends in terms of the living situations and family make-up.

“As well as providing my husband with practical resources to apply for work such as a CV the service gave him increased confidence to apply for jobs he didn’t think he was worthy of applying for. This makes me happy as it is giving our children a positive role model and ultimately a better job will bring more income into the household.” Family member

From the research we carried out, the above quotation was the exception rather than the rule, and there was little evidence that the Employment and Skills Service directly impacts on the family and friends of service users. Family and friends often do make a valuable contribution to the service user in terms of providing employment support and encouragement but again these benefits primarily accrue to the individual as opposed to the family and friends themselves, and this role is reflected in our impact and attribution calculations.

This stakeholder is not taken forward in this analysis but we are keen to put into place data collection systems to capture the relevant information so as to be able to monitor future changes and be in a position to understand and justify inclusion or exclusion of this stakeholder group in future SROI analyses. From the research we have carried out both through telephone interviews with family and friends of service users and the service user workshops we are confident that no negative outcomes

and only positive outcomes that are not deemed significant are experienced by the family and friends of service users.

5.3 Stakeholder involvement

Stakeholders are defined as people or organisations that experience change, whether positive or negative, as a result of the activity being analysed. In SROI analyses we are concerned primarily with finding out how much value has been created or destroyed and for whom.

As well as helping us to find out what really matters to our stakeholders, stakeholder involvement through the SROI process has allowed us to understand more about the strengths and weaknesses of the Employment and Skills Service and provided useful information that will help improve the service in the future.

SROI does not assume to know what changes (positive or negative) may have occurred for stakeholders. Therefore engaging those affected by the Employment and Skills Service is key to understanding true impact.

It is crucial to involve stakeholders at a number of stages in the SROI process. It is however important to be sensitive to the amount of time and resources stakeholders can give to this process and to make the most efficient use of time by collecting data for several stages at once.

For this SROI analysis we have directly engaged with 23 service users. This constitutes consultation with 43% of the total number of service users who have engaged with the Employment and Skills Service during the 11 month period considered through this evaluative analysis. From the consultation undertaken and the information we have gathered, we are confident that the outcomes identified are representative of the larger population group. This direct engagement has taken the form of questionnaires, telephone interviews and specific SROI service user workshops.

The order in which this engagement took place is important as it helps clarify and explain the process through which the impact map was developed, how outcomes emerged and how data collection took place.

Initial service user engagement was through a 'customer feedback' questionnaire sent out to the 53 clients who had used the service during the analysis period. A copy of this questionnaire is included in the appendices to this document. The questionnaire consisted of 12 questions focusing on the specific services being accessed by individuals, the quality of support being received, the outcomes being experienced and achieved by individuals and an indication of to what degree they valued the service. Ten responses were received from service users (19% of all service users) which provided a good basis of information from which to start developing the impact map.

The questionnaires were followed up with a series of more detailed telephone interviews. The initial intention with these telephone interviews was to increase the number of questionnaire responses received through more informal conversations. However, the telephone interviews provided the opportunity for an objective individual (these were not conducted by the Employment and Skills Coach) to explore in more depth the service users views of the service focusing in particular on the ways in which they felt the service was making a difference to them and how much value they as individuals placed on the service. Using open-ended questions and a more informal medium of engagement helped enormously in gathering this information. Five telephone interviews were conducted and the results were written up and used to inform the development of our impact map.

The third stage of service user engagement was through two specific service user workshops, one of which took place in Coventry, and one in Birmingham. Eight individuals attended these workshops (five in Coventry and three in Birmingham). These workshops included informal discussions around individuals' experiences of the Employment and Skills Service as well as open-ended questions and specific interactive activities. As part of the workshop we asked participants to fill in a further

questionnaire which was designed specifically for this SROI project (see appendices). The workshops took place after a significant amount of information had already been gathered through the customer feedback questionnaires and more in depth telephone conversations. This was in addition to significant input from the Employment and Skills Coach, all of which proved valuable in the development of our impact map.

Having a significant amount of information and a basic impact map drawn up prior to the workshops meant that at the workshops themselves we were able to focus on verifying the information already collected and the contents of the impact map (inputs, outputs, outcomes and indicators) as well as gathering information to inform our impact calculations. In terms of service user data already held, we had access to results of the questionnaire completed by service users early on in the SROI analysis, telephone interview results, Outcomes Star results for all users of the service and a wealth of other outputs information gathered by the Employment and Skills Coach. The monitoring and tracking aspect of the Employment and Skills Service was well structured and so for all service users the data was up-to-date and included outcome-based measurements of distance travelled in terms of progress towards employment and development of job specific skills as well as quantitative output information.

Through this process of service user engagement we gained a good understanding of changes that had occurred. We built up a strong evidence base to back up our decisions around how service users valued and experienced change through their engagement with the Employment and Skills Service. The outcomes in the impact map were agreed and verified by stakeholders and were a direct result of the changes which they said had taken place.

Building on the experience gained through this analysis, for future projects we would look to refine the order and methods of engagement with service users. We would look to ensure that even more service users were engaged through the process and that outcomes were tested even more rigorously with the larger population. Our preference would be for this to be done through conducting a focus group or workshop as the first stage of engagement with all stakeholders involved and then as a second stage going on to test the outcomes that emerged with the larger population.

For the landlord we built up our initial understanding around the premise for, the intended and unintended changes being experienced and the value of the service through emailing a set of key questions to three key representatives. This, along with input from the Employment and Skills Coach, (employed by Ashram) informed the early development of the impact map. We went on to interview key representatives in more detail to fully understand the changes being experienced. With input from specific staff from Ashram and the wider Accord Group we developed a specific financial proxy around the value of staff time and capacity spent chasing rent arrears and gathered data around publicity, communications and organisation profile. These were based on organisational information held by the relevant teams across the Accord Group. We also carried out interviews with staff from across the Group and a variety of local employers (who we contacted through Addventures, Accord's enterprise and employment support agency), in relation to the development of a proxy around the value to individuals of completing relevant and recent work experience and starting in employment.

We were not able to involve the state stakeholder directly in this pilot so we used existing research and secondary information already available to help inform our decisions on outcomes, indicators, proxies and impact calculations. The SROI VOIS (Values, Outcomes, Indicators, Stakeholders) database was particularly useful. This is a relatively new body of evidence which aims to develop more commonality of values across SROI studies and is populated by SROI practitioners and members of The SROI Network. Ideally we would have spoken to someone directly from the state to verify our decisions concerning outcomes and valuations. This was not however possible and in carrying out extensive research into the proxies we have used we have aimed to ensure the credibility of this aspect of the report. For future analyses we would look to engage (if possible) directly with all stakeholders. In terms of the state, we recognise the speed at which SROI thinking is evolving and we would be keen to look at other possible options around valuations through exploring other possible ways of valuing how the state manages unemployed people.

Included stakeholders	Methods of engagement
Service users	Customer feedback questionnaires were completed by 10 service users in February 2012.
	5 in depth telephone interviews were conducted with service users in early February 2012.
	8 individuals attended specific SROI service-user workshops which took place in Coventry (5 participants) and Birmingham (3 participants) in late February 2012. Attendees participated in specifically designed interactive activities for this SROI analysis. These 8 service users also completed additional questionnaires to provide more further information around the services they received and the value they attached to these.
Landlord	Email responses to key questions around the intended outcomes for the Employment and Skills Service were received from 3 key representatives: Jas Bains, Chief Executive, Ashram Housing Association Amanda Nicholls, Director, Ashram Housing Association Pritesh Dumasia, Housing Officer, Ashram Housing Association.
	One-to-one interviews with 3 key representatives: Jas Bains, Chief Executive, Ashram Housing Association Amanda Nicholls, Director, Ashram Housing Association Zoe Jubert, Senior Employment and Skills Coach, Ashram Housing Association.
	Informal interviews with representatives from other key teams across Ashram and the wider Accord Group. Claire Morrall, Senior PR Officer, Accord Group PR and Communications team Muna Choudhury, Head of Care and Support, Ashram Housing Association Jon Maybury, Head of Housing, Ashram Housing Association Kally Bharti, Jobs and Skills Coordinator, Accord Addventures Irene Casserley, Volunteering Coordinator, Accord Group Rachel Perks, Employment and Skills Coach, Accord Group
State (defined as DWP and HMRC in terms of welfare payments and tax collection and payment)	Secondary data and intelligence

Table 2: Methods of engagement

6. Theory of change

6.1 Theory of change for Employment and Skills Service

The theory of change or 'logic model' for the Employment and Skills Service (Fig 2) shows the planned and expected changes brought about and the chain of outcomes expected to be triggered for service users and other stakeholders. This theory of change was developed prior to undertaking this SROI analysis and explains what Ashram, the landlord, perceived as the story of how the Employment and Skills Service makes a difference – both to Ashram tenants and Ashram Housing Association.

This theory of change (Fig 2) was a useful starting point when it came to building the impact map for the Employment and Skills Service.

The impact map developed as part of the SROI process describes this theory of change in terms of how inputs and activities lead to specific outputs, and then in turn how these lead to outcomes. As such the impact map underpins the analysis as it is the outcomes that are described that are measured and valued through the SROI calculations. Crucially however the impact mapping stage and indeed the entire SROI process is based on a multi-stakeholder approach which allows the benefits of all stakeholders to be analysed, and for all stakeholders to be involved in the process and to verify that the impact map truly reflects what actually changes. This builds on the logic model and verifies or otherwise the landlord's views on what the service actually achieves and the impact it has.

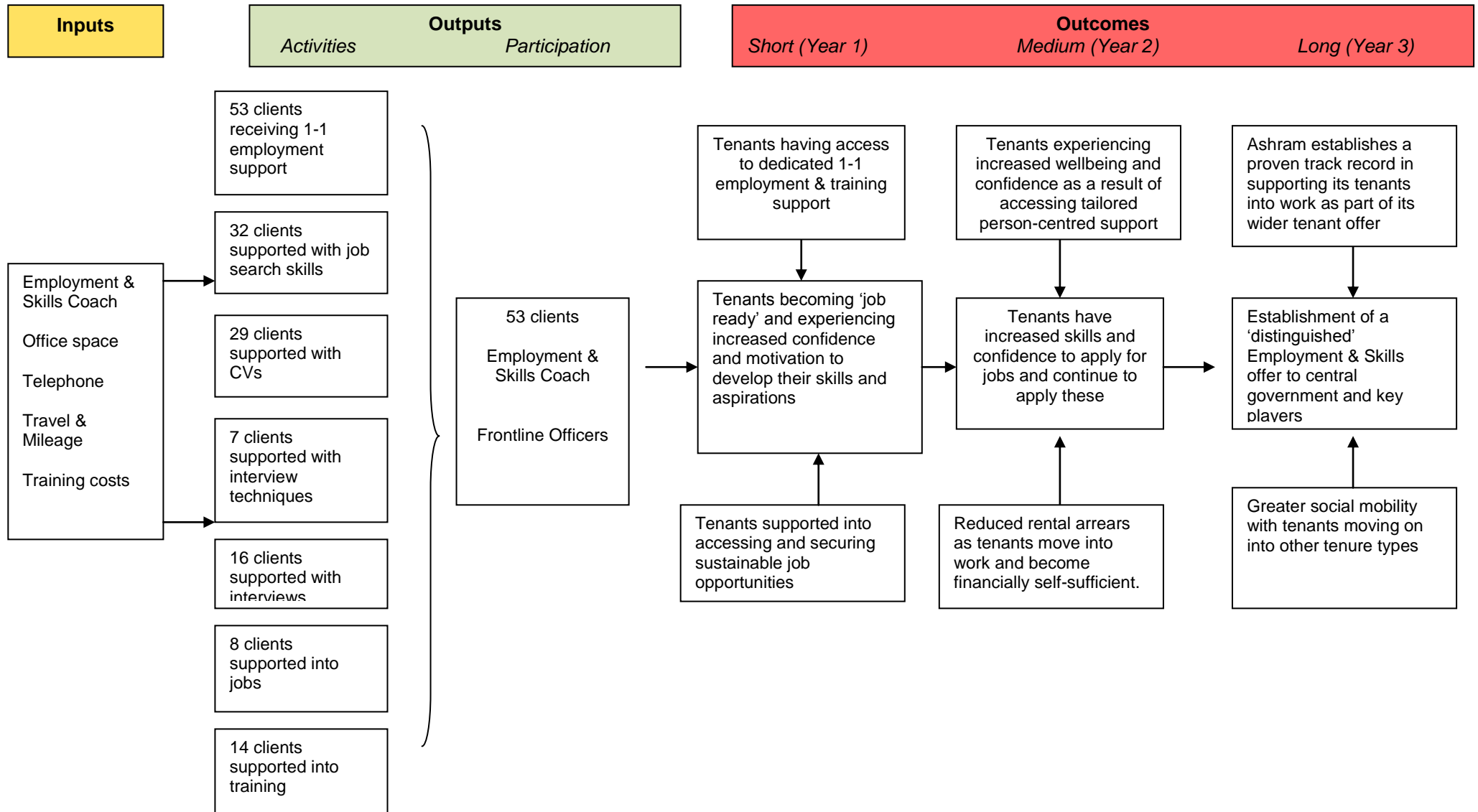
For service users, it was expected that they would benefit from the service in terms of gaining job specific skills, becoming more work ready, gaining experience and moving closer towards employment. As a result the service was expected to address the low confidence and esteem often experienced by people out of work.

For the landlord, it was expected that through offering the Employment and Skills Service the relationship with tenants would extend and deepen. As a result of tenants moving into employment it was expected that individuals would become more financially self-sufficient and the rent arrears situation for people using the service and moving into employment would improve. In the longer term it was hoped that Ashram would develop a proven track record in supporting its tenants into work as part of its wider tenant offer.

Fig 2: Theory of change

Program: Employment & Skills Service **Logic Model**

Programme Aim: To establish a dedicated one-to-one tailored, flexible employment and skills support service to help Ashram’s tenants move along their journey to work.



6.2 Inputs

The inputs in the impact map refer to the contributions made by the stakeholders to make the activity (the Employment and Skills Service) possible and the financial value of the inputs. In this instance the total financial input is made by the landlord and the value is £36,689. This figure includes the salary and costs for the Employment and Skills Coach, training costs, travel expenses, phone costs and office space and services. Below is a breakdown of these figures

- Senior Employment & Skills Coach's salary (£29,904)
- Office Space (£1,500)
- Mobile telephone (£1,300)
- Travel & mileage (£1,485)
- Training Costs (£2,500)

Each of these inputs has been valued and comprises the investment against which the social return can be calculated (these are shown on the impact map).

6.3 Outputs

Whilst the focus on outcomes is crucial to understanding change in SROI analyses it is also important to understand the scale of the change. This information is provided by the activity's outputs. The outputs are the elements which tell us an activity has taken place and provide an indication of scale e.g. the number of people accessing different elements of the Employment and Skills Service.

From the existing data gathered by the Employment and Skills Coach the following outputs have been achieved for the April 2011 – February 2012 period:

- 53 clients have received direct one-to-one employment support from the Employment and Skills Service. This has included one-to-one support with tasks such as accessing training opportunities, creating a CV, applying for voluntary work, completing a job application form, searching for jobs and interview techniques.
- 32 clients have been supported with job search skills.
- 34 clients have had support to create or edit and improve their CVs.
- Interview technique sessions have been conducted with seven clients.

Out of the 53 clients supported, job interviews have been successfully secured by 16 clients, with nine of these people being successful in gaining a job offer. One person was unable to take up the job offer due to it only offering 15 hours per week and as a single parent she would not have been financially better off taking this offer, resulting in eight people gaining paid employment (seven full-time equivalents) during the period April 2011 – February 2012. Two of these clients gained part time work, whilst the rest entered full time roles. Clients entered a range of different industries, including care and support, hospitality, administration and warehousing / distribution.

There have also been successes in supporting individuals to access skills development opportunities, with 18 clients accessing training courses. This breaks down into eight clients accessing formal training opportunities, with another ten accessing informal training opportunities. Further to this nine clients have been supported to access work experience placements which have helped them gain both valuable work related skills and a reference for future job applications. This demonstrates a clear history of success with not only providing support to residents, but support which also leads on to positive outcomes for residents.

6.4 Identifying outcomes

Understanding what changes is the second principle of SROI and is crucial to understanding the effectiveness of a programme or activity.

In order to establish the outcomes for the impact map, we had to understand the changes that occurred for each stakeholder. We gathered this evidence through interviews with a number of key representatives from the landlord and specific questionnaires, telephone interviews and workshops with tenants who had used the service. The workshops in particular provided a rich source of evidence on the changes experienced by tenants.

In terms of the service users, key themes emerged as individuals explained the difference engaging with the Employment and Skills Service had made to them. Participants at the workshops were prompted to understand changes at the scale of the individual: what does the change mean for them? The key trends were:

- As a result of structured one-to-one personalised support, residents are engaged in purposeful activity that they consider has improved their wellbeing.
- As a result of this programme, tenant’s confidence and motivation is increased and they progress towards employment more readily.
- As a result of one-to-one support sessions, residents become work ready and some gain employment.
- As a result of ongoing support, tenant’s independence and work readiness is increased and they deal positively with work related issues.
- As a result of training and work experience residents begin learning towards qualifications or employment.
- As a result of the service, tenants felt that they had travelled a distance (made progress positively) towards job specific skills and employment.

No significant negative outcomes were reported by service users during the stakeholder engagement. All service users spoke positively about the support they received irrespective of the length of time they had been accessing the service.

Following on from the themes identified above, through analysis of questionnaire and telephone interview responses and in conjunction with the service users who participated at the workshops, we developed and verified the outcomes to be taken forward in the SROI analysis. Across the three stakeholder groups, 10 outcomes were identified to take forward. We have included all of the outcomes in Table 3 below, including the two (in red) which we chose not to follow through and attach financial value to.

Stakeholder	Un / intended changes	Inputs	Outputs	Outcomes
Unemployed clients / tenants	More job ready Gain employment Gain work experience Skills development	Time, travel	# referrals, clients engaged, placed in voluntary opportunities, placed in jobs, placed in training, placed in apprenticeships	Change in personal wellbeing (self confidence)
				Change in progress towards employment through CV support received
				Change in progress towards employment through work experience undertaken
				Change in progress towards employment through completion of relevant training

				Change in employment status
				Change in individual wellbeing (raised aspirations)
Landlord	Reduce arrears Reduce ASB CSR / social mobility RSL leader / PR	Staff time, staff £, overheads, resources, volunteers time, training	Reduction in rent arrears	More financially self sufficient tenants – landlord spends less time chasing arrears
			Service advertised and offered to all Ashram tenants	The increase in awareness of the service and publicity gained leads to an improved profile and reputation for Ashram Housing Association and the wider Accord Group
				Residents using the service become a more settled, satisfied and involved group of tenants which enables Ashram to provide a more efficient service
State	Reduction in DWP payments. Increase in tax take and national insurance collection for HMRC as individuals move into work (may be offset to some degree as individuals may receive working tax credits)		Reduction in DWP payments	Reduced reliance on state benefits
				Reduction in Job Seekers Allowance paid out as individuals move into employment
			Inland Revenue - increase in tax take / national insurance collection from HMRC	Increased tax take and national insurance (may be partly offset by payment of working tax credits)

Table 3: Impact map – Outcomes

We asked the tenants who have used the service what changes they had experienced. They indicated: increased self-confidence, improvements in progress towards employment as a direct result of specific aspects of the Employment and Skills Service and changes in employment status. The landlord was particularly interested in having more financially self-sufficient tenants, increasing their external profile and increasing their breadth of offer and services. The changes for the state were in terms of the reduction in payment of state benefits and increases in Inland Revenue and National Insurance payments through individuals moving into employment.

The multi-stakeholder approach in SROI allows the benefits to all stakeholders to be analysed. A social sciences approach to saturation sampling was adopted to build the theory of change. This means that the researcher conducts stakeholder engagement until all the outcomes have been identified, and extra engagement produces no new information. This was achieved through the three stages of service user engagement: customer feedback questionnaires, followed by more in-depth telephone interviews (with different individuals) and service user SROI workshops (with different service users again). It is acknowledged that whilst the numbers of stakeholders engaged may appear on the low side (we engaged directly with 43% of service users) we are confident that the sample is representative of wider stakeholders and therefore sufficiently robust to identify outcomes.

Service users

Outcome 1 – Change in personal wellbeing (self confidence)

Service users expressed how much value they placed on the Employment and Skills Service in terms of increasing their confidence and feeling more positive about looking for and moving towards work. Service users talked about feeling more confident about applying for jobs, looking to extend their search areas and feeling more positive about overcoming potential barriers to work such as childcare issues.

“With a lot of help and encouragement with Zoe I've found confidence and believe in myself that I can find a job sooner or later” Service user

Outcomes 2-4 – Change in progress towards employment

Outcome 2 - Change in progress towards employment through CV support received

Outcome 3 - Change in progress towards employment through work experience undertaken

Outcome 4 - Change in progress towards employment through completion of relevant training

The service users who were engaged with through this process expressed a positive change in their progress towards employment since accessing the Employment and Skills Service. They valued the variety of services on offer from the Employment and Skills Coach and the personalised support they received. They spoke in particular about the value of undertaking work experience, volunteering placements, training courses completed and support provided in preparing CVs in terms of their own progress towards employment.

We decided to divide this outcome into three distinct outcomes in order to reflect the differing values associated with receiving CV support as compared to undertaking relevant work experience or completing a relevant training course in terms of individuals making progress towards employment. Service users not only spoke about the benefits of these different aspects of the service, but actively linked the support they had received in these areas to their own personal journey and progress towards employment. This association was picked up on both through the telephone interviews and the service user focus groups.

“Zoe has already found me volunteering and charity working opportunities and these are helping prepare me for when I start work.” Service user

“I have gained confidence, experience and knowledge” Service user

“Zoe encouraged me to attend an open day, provided CV support and 1-1 support time to prepare me for this and is always available to phone. Zoe is the reason why I have a job.”

Outcome 5 – Change in employment status

One of the eight service users who attended the workshops had experienced a change in employment status and been offered a full time job. She was currently waiting for the contract to be formalised and was hoping to start work the following week. Another service user had been offered a job but was unable to take it up due to the hours of work and childcare issues, and others talked about attending interviews for a number of positions since receiving support from the Employment and Skills Service. Specific feedback from the workshops as described above and information gathered from the questionnaires informed our decision to include ‘change in employment status’ as an outcome on our impact map. This was confirmed by the Employment and Skills Coach who was able to provide full details on the number of clients who had experienced a change in employment status through monitoring and tracking records, appointment letters with confirmation of start dates and the ongoing support offered to service users who had moved into employment.

Landlord

Outcome 6 - More financially self sufficient tenants – landlord spends less time chasing arrears

Although this wasn't necessarily the primary factor in the landlord setting up the service, the landlord expressed the desire to benefit from the service in terms of tenants becoming more self-sufficient and

the rent arrears situation improving for tenants as and when they moved into employment. This would in turn reduce time and capacity spent on chasing rent arrears. There were also suggested benefits around developing deeper relationships and improved engagement with tenants through them accessing the service.

As noted earlier in this report, the context of high percentages of social housing tenants being out of work and the stated request from tenants for support in finding employment has provided the basis for many housing providers engaging with the worklessness agenda in recent years. This role for social housing providers has been accentuated by full-scale reform across the work and welfare policy landscape. For housing providers welfare reform entails a greater risk of rent arrears, more demand for advice and support services from tenants and importantly, stronger incentives to help residents find and sustain work

Outcome 7 - The increase in awareness of the service and publicity gained leads to an improved profile and reputation for Ashram Housing Association and the wider Accord Group

The Employment and Skills Service has become an increasingly high profile initiative across the Accord Group and in the wider domain. Since the service has been set up Employment and Skills Coaches have been appointed in four of the other partner organisations and this has been reflected in press releases and mentions of the service in communications. The Employment and Skills Services has been highlighted and referred to in a number of articles and papers circulated to wide external audiences. It has therefore helped to build the profile of the landlord and Ashram's reputation amongst its tenants, peers, partners and funders.

State

Outcome 8 - Reduced reliance on state benefits

Outcome 9 - Reduction in Job Seekers Allowance paid out

Outcome 10 - Increased tax take and national insurance

Although the state does not directly invest in the Employment and Skills Service it does receive some important benefits as individuals move into employment. When clients begin working with the Employment and Skills Coach they are asked for information on their current situation which includes which if any benefits they are claiming. From interviewing the Employment and Skills Coach and accessing the database of information held on clients we were confident in identifying the above three outcomes for the state when individuals move into employment. For outcome 10, although the state is likely to gain from increased tax take and national insurance payments, this may in part be offset by working tax credits. From the information held by the Employment and Skills Coach we were able to take into account the amount of working tax credit which may be paid to the individuals who moved into employment.

In relation to Table 3 (page 25), the rationale for not including the change in individual wellbeing (raised aspiration) for tenants was that although one participant in our workshops alluded to this change, we did not feel that enough stakeholders (through our workshops and the results of questionnaires and telephone interviews) reported that this change had taken place. We opted to include the change in personal wellbeing (self confidence) outcome instead which was much more widely reported amongst unemployed clients using the service.

We were aware when undertaking this study that there could be more outcomes which have not been included in the final impact map, such as more income being generated within local communities and increased skills, knowledge and job satisfaction for housing support staff. For this study we were not able to include the wider community as part of the analysis. As the Employment and Skills Service operates across a large geographic area (Ashram works with tenants across Birmingham and Coventry) we did not feel there would be significant impact across these communities as the users are so dispersed. As explained in the Stakeholder section (page 21) of this report we were not able to include housing support staff in this analysis. We have also noted similar studies which have attached a value to society of volunteering placements (we have not attached a value to this). We have chosen to reflect these outcomes here in narrative form only but not included them in the SROI calculation or the final impact

map. Their value here is in terms of the journey travelled by stakeholders and their personal experiences, an important measure of the impact of the service.

6.5 Case studies

In the case studies included in this section all names have been changed.

Case study 1

Angie heard about the service when the Employment and Skills Coach knocked on her door to introduce herself and what the service could offer. Angie was initially doubtful as to whether the support would go anywhere, but she soon received a follow-up letter to her initial conversation in the post. Angie has since had 1:1 support from the Employment and Skills Coach, she has heard about and undertaken voluntary and charity working opportunities and she has attended a week long DIY course.

As a single parent with a young child and financial constraints around childcare, Angie is not looking for employment immediately. She is impressed by the opportunities she has been made aware of through the Employment and Skills Service to undertake work experience and charity work which take into account her childcare responsibilities. Angie speaks very highly about the personal and direct approach offered by the Employment and Skills Service and the impact this support has had on her own motivation and aspiration.

In the past Angie has found it difficult to motivate herself to go out and look for help with searching for work. She feels that the Employment and Skills Coach has helped her and motivated her to find opportunities, and she values the fact that the Coach “doesn’t give up on you”.

Since signing up for the service Angie feels much more positive about life. She recently attended a one week DIY course which was arranged by the Employment and Skills Coach. Before this course she had had a long run of being home everyday with her young daughter. She now has a ‘can-do’ attitude and she feels this has had an impact on her two year old daughter. Angie sees this as a positive step forward.

When asked where she was before accessing the service and where she is now, Angie said, that before she was “unaware of what was available” and had “given up hope”. Now she says that she is “more confident about building my CV and finding employment when I finally get childcare”.

Case study 2

Donna was introduced to the Employment and Skills Service by her housing officer.

She was made redundant in 2009 and since then has found the support provided by her local Job Centre Plus (JCP) to be limited. Donna feels that the JCP staff tell people to look for a job but they don’t always provide much support and advice on how to go about it.

Since signing up with the Employment and Skills Service Donna has received details of potentially interesting and relevant job vacancies and she was encouraged to attend an open day at Ribbon Court, an extra-care sheltered housing scheme in Coventry.

Donna received one-to-one support time with the Employment and Skills Coach and was impressed by the hands-on and personalised approach taken. Donna has been offered a job at Ribbon Court and she feels that her getting a job is a direct result of her signing up to the Employment and Skills Service.

Case study 3

Charlie has been receiving support from Ashram’s Employment and Skills Service for five months as he has started to look for work after coming out of prison. He speaks highly of the support he has received from both his support worker and the Employment and Skills Service, which was recommended to him by his housing officer.

Before 2009 Charlie had always had a job and he had found it easy to move between jobs. The Employment and Skills Service has provided him with support around CV writing and interview techniques. He feels the service has helped him increase his confidence and since signing up for the service he has had four job interviews.

Charlie described his starting point coming out of prison as “rock bottom and jobless.” He now feels that, “with a lot of help and encouragement from Zoe I’ve found confidence and believe in myself that I can find a job sooner or later.”

Case study 4

Bernie had been thinking about getting a job for a while so the Employment and Skills Coach knocking at her door to spread the word about the service came at a very good time.

Bernie had worked previously for a family business but felt very nervous and lacking in experience in terms of job hunting. She feels comfortable sharing these feelings with the Employment and Skills Coach, feelings which she hasn’t felt comfortable sharing with her family.

Bernie has received one-to-one support, CV support and advice on interview techniques. She feels much more positive about her search for employment and feels that this has had an impact on her own children. With a 17 year old daughter at college who is looking for part time work, mum and daughter have strengthened their own relationship and are able to support each other in looking for work.

Bernie described her starting point as having a “lack of confidence and experience with job hunting” and where she is at present in terms of her journey as having “gained confidence, experience and knowledge”.

7. Evidencing outcomes and giving them a value

The previous section identified the outcomes that result from Ashram's Employment and Skills Service. This section focuses on how these were evidenced and measured in order to understand the extent to which change has occurred.

7.1 Indicators and data sources

The table below shows the indicators and data sources we opted to use for each outcome. Demonstrating and valuing outcomes particularly where they are less tangible or have no easily identifiable market value relies on the identification of indicators which express how the outcome is experienced in a way that is measurable.

Indicators tell us whether the outcome (change) has occurred and to what extent. We have tried to balance subjective (or self-reported) indicators with objective indicators to make our analysis as robust as possible.

It is acknowledged that distance-travelled indicators are the most effective and best practice approach to understanding both binary change and magnitude of change. For this analysis we have aimed to wherever possible use distance travelled indicators.

Stakeholder	Outcome	Indicator	Indicator source
Tenants	Change in personal wellbeing (self confidence)	Number of people reporting a change in self confidence – and the amount of change experienced (self reporting / distance travelled)	Rainbow exercise (completed by participants at service user workshop) Data gathered by Employment and Skills Coach through one-to-one contact with service users
	Change in progress towards employment through CV support received	Number of people who have stated that the CV support they have received has moved them forward in terms of their progress towards employment.	One-to-one contact / KPI data collected by Employment and Skills Coach
	Change in progress towards employment through work experience undertaken	Number of people who have stated that the work experience they have undertaken and completed has moved them forward in terms of their progress towards employment.	KPI data collected at quarterly tracking meetings between service user and Employment and Skills Coach One to one contact – self reporting
			Work experience log / feedback from service user and work experience host
	Change in progress towards employment through completion of relevant training	Number of people who have stated that the training course they have completed has moved them forward in terms of their progress towards employment.	KPI data collected at quarterly tracking meetings between service user and Employment and Skills Coach One-to-one contact – self reporting
			Training records / certificates
Change in employment status	Number of people moving into employment	Offer letter / start date	
Landlord	More financially self sufficient tenants - landlord spends less time chasing arrears	Staff reporting a reduction in time (number of hrs) spent chasing arrears	Ashram HA Tenancy & Estates spreadsheet Consultation with Ashram Housing team representatives

	Improved profile and reputation for Ashram Housing Association and the wider Accord Group	Number of references to the service in internal and external communications. Number of new partnership activities arising. Level of expansion of similar services across the Group	Interviews with HA staff, Communications tracking information and group data on new business and partnerships
State	Reduced reliance on state benefits	Welfare benefits paid to unemployed	Number of individuals obtaining jobs and net reduction in welfare payments
	Reduction in Job Seekers Allowance paid out	Job Seekers Allowance paid to unemployed	Number of individuals obtaining jobs and reduction in employment support allowance payments
	Increased tax take and national insurance payments	Change in tax take and national insurance payments as individuals move into employment	Number of individuals obtaining jobs and net increase in tax contribution and national insurance payments, taking into account that some of these benefits may be offset by payment of working tax credits

Table 4: Impact map – Indicators

7.2 Duration of outcomes

For each outcome we have added a duration figure to the impact map which relates to the length of time over which the outcome is expected to last or against which the outcome will be attributed to the Employment and Skills Service. The effect of some outcomes will last longer than others; some outcomes depend on the activity continuing and some do not. We have been fairly conservative in the duration for which we have claimed outcomes. This is called the benefit period. Where we have claimed for in excess of a one year duration we have opted for a generous drop-off rate.

For the outcome for unemployed clients which relates to a change in progress towards employment, we have opted for an ‘up to one year’ duration, the rationale being that support around CV writing, training and work experience needs to be regular in order to sustain the benefits. We have put a three year duration on the outcomes for the state around reduced reliance on state benefits, reduction in employment and support allowance and increased tax take. We have also put a three year duration on the outcome to the individual of moving into employment, and the reduction in staff time chasing rent arrears. We will however need to review these and monitor the length of time that clients who gain employment are staying in their jobs. These outcomes are likely to continue for the state, the individual and the landlord after they have finished receiving support from the Employment and Skills Service and moved into employment (although over time the impact that the service has had will diminish).

7.3 Outcome incidence – how much change occurred for stakeholders?

Outcomes alone tell us about effectiveness, and therefore value for money of an intervention. This section explains how the amount of change occurring for each stakeholder was understood.

Stakeholder	Outcome	Indicator	Quantity	Amount of change / calculation
Tenants	Change in personal wellbeing (self confidence)	Number of people reporting a change in self confidence	46 (minus 8 who have moved into jobs) = 38	46 service users reported a positive change in self confidence. The level of change was measured through a sample of 8 stakeholders who experienced 42.5% change in improved self confidence – reflected in 42.5% of proxy value being calculated
	Change in progress towards employment through CV support received	Number of service users who have received CV support and reported that this has moved them forward in their progress towards employment	29 (then double counting deduction of 20) = 9	<p>Number of service users reporting change in progress towards employment as a direct result of CV support is 29.</p> <p>Deducted from this figure are the number of service users who moved into work (8) and the numbers of service users who completed relevant training (8) and work experience (4) who also reported that CV support had also helped them progress towards employment.</p> <p>The reason for these deductions is that they form part of a chain of events so cannot be counted here as this would be double counting.</p>
	Change in progress towards employment through work experience undertaken	Number of service users who have undertaken and completed work experience and reported that this has moved them forward in their progress towards employment	7 Deduction of 1 = 6	<p>Number of service users reporting direct change in progress towards employment as a result of work experience.</p> <p>Deducted from this figure is the 1 individual who has moved into employment and undertaken work experience and the number of service users</p>

	Change in progress towards employment through completion of relevant training	Number of service users who have completed a relevant training course and reported that this has moved them forward in their progress towards employment	14 Deduction of 1 Deduction of 2 = 11	Number of service users reporting change in their progress towards employment as a direct result of relevant training course completed. Deduction of 1 individual who has moved into employment and stated that completing a relevant training course has moved them forward in their progress towards employment. Deduction of 2 individuals who also reported change in progress towards employment through work experience
	Change in employment status	Number of people moved into employment	7	Number of individuals who have moved into employment is 7 – 6 full-time and 2 part-time jobs which for this analysis has been equated to 7 full time jobs.
Landlord	More financially self sufficient tenants - landlord spends less time chasing arrears	Staff reporting a reduction in staff time (hrs) spent chasing arrears	48	Number of hours less spent per annum by housing team chasing arrears for tenants that moved into employment through using the service and moved out of rent arrears – 4 service users Indicator based on scaling up average number of hours spent per week (15 mins) on each case of rent arrears. 15 mins per week equates to 1 hour per month and 12 hours per year per rent arrears case.
	Improved profile and reputation for Ashram HA and the wider Accord Group	No. references to the service in internal and external communications - 5 No. new partnership activities arising - 2 Expansion of similar services across Group - 4	1	The quantity of change represents that through consultation responses and indicator information gathered by the landlord (Accord PR and Comms team) this outcome was reported as occurring. The figure of 1 represents the change occurring for the landlord.
State	Reduced reliance on state benefits	Welfare benefits paid to unemployed	7	As per Outcome 3 (service user) – change in employment status - Number of individuals
	Reduction in Employment Support Allowance	JSA paid to unemployed	7	

	Increased tax take (Nat. Insurance)	Change in tax take and national insurance payments as individuals move into employment	7	who have moved into employment is 7 – 6 full-time and 2 part-time jobs which for this analysis has been equated to 7 full time jobs.
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Table 5: Outcome incidence calculations

Outcome 1 – Change in personal wellbeing

Increased self confidence amongst service users was measured through the number of individuals who reported a positive change to their self confidence through 1:1 monitoring and tracking interviews with the Employment and Skills Coach. The average level of increase (42.5%) in self confidence was measured through a rainbow exercise completed by the eight service users (15% of the larger population) who attended the service user workshops. This level of change was applied to the number of individuals who had reported a positive change (46 out of the 53 service users). The rainbow exercise is a practical resource which was developed by the Planning for Real Unit (part of the Accord Group who specialise in community engagement). It allows individuals to plot their personal distance travelled in terms of a particular issue or topic showing where they have come from and where they have moved to over a period of time – and to provide a rationale for this change. The exercise is completed individually without group discussion and encourages individuals to reflect on their rationale but not have to speak up in front of the group. The average amount of change across the sample group in terms of increased self confidence was 42.5%. This was applied to the number of people across the stakeholder group of 53 (46 individuals - 87%) who had reported an increase in self confidence. To avoid double counting (see explanation at the end of this section) the eight individuals who experienced a change in employment status were excluded from the stakeholder group, resulting in a quantity figure of 38.

Outcomes 2, 3 & 4

Change in progress towards employment through CV support received

Change in progress towards employment through work experience undertaken

Change in progress towards employment through completion of relevant training

These three outcomes related to service users who reported making progress towards employment as a direct result of the support they had received through the Employment and Skills Service. The indicators we used for these outcomes were the number of service users who directly reported that they felt they had progressed further towards employment because of the CV support they had received, or the work experience or training they had completed. This information was reported directly by service users to the Employment and Skills Coach as opposed to being taken from records.

For outcome 2 we used the number of service users who had received CV support and actively stated that the CV support they had received had resulted in a positive change in progress towards employment as the indicator. This information was self reported by service users and collected at quarterly monitoring and tracking 1:1 meetings with the Employment and Skills Coach.

Similarly for outcomes 3 and 4 we used the number of service users who had completed relevant training and undertaken work experience and actively stated that these had resulted in a positive change in progress towards employment as the indicators.

As explained above it is acknowledged that distance-travelled indicators are the most effective and are the best practice approach to understanding both binary change and magnitude of change. For the progress towards employment through the completion of relevant training outcome we did consider exploring the magnitude of change in relation to individuals' distance travelled in terms of their development of job specific skills based on their Outcomes Star records. This would have involved looking at the service user population as a whole and a base line in terms of the development of their job specific skills, and exploring whether individuals who had stated that they felt they had progressed towards employment since undertaking training had progressed further than others who had not actively stated that training had moved them further towards employment. The more detailed and specific analysis of Outcomes Star records is an area we intend to focus more closely on in the future. However

after much discussion we took the decision to use the number of service users who stated that completing training had moved them closer towards employment as the indicator. We would be keen in future analyses to delve deeper into understanding and capturing more information on the magnitude of change individuals are experiencing, and how much progress they feel is being made.

For these outcomes and indeed all outcomes it is very important to adhere to the SROI principle 'Do not over claim'. These outcomes for service users are closely related and it is vital to understand whether some constitute part of a chain of events and if this is the case to ensure that double counting has not occurred.

Outcomes 2, 3 and 4 all form part of a chain of events. We took the view to divide up the outcome of individuals' progress towards employment on the basis that some progressed further towards employment than others and that the different aspects of progress reported towards employment should be valued separately. Ensuring that double counting does not occur here is vital, not only in terms of outcomes 2, 3 and 4, but also in terms of increasing self confidence and changes in employment status. A detailed explanation of how we have ensured double counting has not occurred is included at the end of this section of the report. However it is important to note that where an individual has actively stated progress towards employment as a result of more than one of these three 'progress towards employment' outcomes, deductions have been made so the value of only the aspect which they felt had moved them furthest towards employment has been included in our calculations.

Outcome 5 – Change in employment status

Although a binary construction it was considered vital to include this indicator in the analysis as this was the change which was most important to all service users engaged through the process, and is at the heart of the Employment and Skills Service. This change represents individuals moving from being out of work into employment and the quantity figure represents the number of individuals who have moved into full time (or equivalent) employment. It is difficult to measure magnitude of change, although in time and as the service becomes more established it may be possible to look at whether there is a relationship between the length of time individuals have engaged with the service and the speed at which they move into employment. As the service has only been operating for 11 months, it was not possible to analyse this aspect. It may also be possible to look at the journey travelled for the individuals who have moved into employment and see whether there is a relationship or pattern in terms of their progress to employment and the particular aspects of the service they have made use of before moving into employment. For this analysis the time, capacity and resources were not available to look into these links in more detail.

Outcome 6 – More financially self sufficient tenants - landlord spends less time chasing arrears

To measure this outcome we considered the average number of hours spent by Ashram's Housing team spent chasing up each case of rent arrears, and the reduction of time which resulted from having fewer cases of rent arrears to deal with. Through the tenancy and estates spreadsheet we were able to gather data on all individuals who had moved into employment and identify those who had moved out of rent arrears since moving into employment. As the timescale was relatively short many has only just moved into employment but there was a strong correlation between moving into employment and improving rent arrears situations, which again is at the very heart of the landlord's aspirations for what the service will achieve. Looking again at this correlation over time will be beneficial as the number of service users increase, and the number of individuals moving into employment grows. Going forward it would be good practice to introducing a measure of the magnitude of change in terms of the level of change for individuals improving their rent arrears situation, further strengthening the robustness of this indicator.

Outcome 7 - Improved profile and reputation for Ashram HA and the wider Accord Group

Through material and evidence provided from the Accord Group PR and Communications team along with other departments across the Group we were able to establish the level of coverage – both internal and external – about the Employment and Skills Service. This included extensive promotion of the service in the 'Our House' newsletter, distributed to more than 10,000 residents. Over the period of 11 months articles specifically on the service appeared in five editions. As the Employment and Skills Service has gained profile across the Group, four new Employment and Skills coaches have been

appointed to partner organisations and the service has been an important part of two successful bids for new programmes and funding. The quantity figure represents that the outcome has occurred through the stated indicators and the change (improved profile and reputation) has occurred for the landlord.

Outcomes 8, 9 & 10

Reduced reliance on state benefits

Reduction in Job Seekers Allowance paid out

Increased tax take and national insurance payments

In a similar vein to Outcome 3 (for the service users), although these indicators are binary constructions it was considered vital to include them in the analysis. The type of change is the change in status from unemployed to full time employment. In future analyses it may be possible to develop some sort of scale to reflect changes in employment status which differentiate between part-time and full-time roles. Individuals moving into employment and the direct impacts of this change are fundamental to the service and represent the change which was most important to all service users engaged through the process, and also to the state in terms of the current political focus and priority of moving people away from benefit dependency and into employment.

7.4 Avoiding double counting

The outcomes for the service users engaging with the Employment and Skills Service are part of a chain of events. Where individuals have moved into work (change in employment status) this will be the only outcome that can be claimed for them as improved confidence and progress towards employment are part of the chain of events. If a chain of events is identified then to count and value every stage of this chain would be to double count and over inflate the value of the change as each stage in the chain will include the value of any stages leading up to it.

In the calculations in this section we have been careful not to double count. The eight individuals who moved into employment have not been counted in the change in personal wellbeing or progress towards employment outcomes. Across the three progress towards employment outcomes deductions have been made to ensure that double counting has not occurred and individuals who have reported progress towards employment against more than one of these outcomes have only been counted against a single outcome. The single outcome is judged to be the one where most progress has occurred (i.e. the individual has progressed furthest towards employment) and subsequently there the highest value has been assigned. For this analysis, based on discussions with the Employment and Skills Coach around individuals reporting these changes, input from service users and research with employers, the valuations have been assigned according to the degree of progress felt to have been made towards employment - work experience came out highest followed by training and then CV Support. A full explanation of the valuations follows in section 7.5.

Individual plans put together jointly by the service user and the Employment and Skills Coach form the basis for the services received by an individual and the progression towards employment. Support is personalised and tailored and not everyone is working towards the same milestones or across a linear path i.e. some individuals are looking to gain work experience and develop their skills but are not actively looking for employment at that time. For other individuals support is tailored around confidence building in terms of developing job search skills and aspirations for the future. It is for this reason that change in personal wellbeing is not necessarily judged to be part of the chain of events (the exception is for those individuals who have experienced a change in employment status and moved into employment). Some individuals have only reported a change in self confidence but we have taken the decision that an individual can report and be counted as both achieving an increase in self confidence in addition to making progress towards employment. However, for the eight individuals who moved into employment we have taken the decision that they can not also be counted as experiencing an increase in self confidence (even if they have reported this outcome) as it forms part of the chain of events and including them against this outcome would constitute over-claiming through double counting.

7.5 Financial proxies

When identifying financial proxies it is important to remember that we are not interested in whether money actually changes hands and it does not matter whether or not the stakeholders in question could afford to buy something – they can still place a value on it. The proxies demonstrate the value of the outcomes in monetary terms. For things that are traded in markets, the market price is used when suitable. An example of this (in the table below) is where we have opted to use the price of a confidence training course and the cost of commercial support to find a job as proxies for the changes in personal wellbeing and change in progress towards employment through CV support outcomes for unemployed clients. When a price is not available, other ways of approximating how much stakeholders value the outcome can be used. An example is the proxy we have used for the landlord where we have worked out the value of staff time as the proxy for the landlord spending less time chasing rent arrears. As the SROI process becomes more widely adopted the available SROI resources and databases also increase leading to more consistent and recognised indicators and proxies.

Stakeholder	Outcome	Indicator	Quantity	Financial Proxy	Source
Tenants	Change in personal wellbeing (self confidence)	Number of people reporting a change in self confidence	38	Cost of confidence training £1195 £507.88	www.emagister.co.uk Also used as a financial proxy in nef's SROI conducted for Coventry's Local Enterprise and Growth Initiative (LEGI) (unpublished) ⁷ This represents a market-traded good to help people achieve increased self confidence, which is a measure of wellbeing. Calculating 42.5% of the full confidence course of £1195 reflects the average 42.5% increase in self confidence reported by service users.
	Change in progress towards employment through CV support received	Number of people stating that CV Support and job searching support has moved them forward in progress towards employment	9	Cost of commercial support to find a job £220.90	Found at www.CVconsultants.co.uk . This covers the costs of preparing a CV and giving guidance on job seeking This represents a market-traded good to help people move towards finding employment.

⁷ Coventry's Local Enterprise and Growth Initiative (LEGI), unpublished, 2008

	Change in progress towards employment through relevant work experience undertaken	Number of people who have undertaken work experience and stated that this has moved them forward in their progress towards employment	6	Value of work experience to service user as equivalent to four days middle manager time plus oncosts at potential employer £399.74	Based on interviews with service users and information from local employers who Accord work directly with. The value is based on the estimate that an average of 1 day per week over the duration of four weeks is saved in employer middle manager staff time. Average salaries plus oncosts for middle managers as stated by employers and as a result of research in the relevant sectors to the individuals reporting this outcome (retail, teaching, warehouses) have been used to calculate this proxy. Salaries have been verified through information on www.payscale.com
	Change in progress towards employment through completion of relevant training	Number of people who have completed a relevant training course and stated that this has moved them forward in their progress towards employment	11	Average market cost of a similar level and duration training course i.e. Level 2 English or Maths, ESOL, IT £349	This represents the average market cost of training courses undertaken by individuals reporting this outcome including short courses in Level 2 Maths and English, ESOL and IT user level 2. Although individuals would not necessarily have paid fees to complete these courses (government funding is available for some individuals in receipt of benefits and searching for employment) the cost represents a product available to help people move towards finding employment. Data on course costs was sourced from discussions with the Employment and Skills Coach and a number of websites offering similar level and duration courses including: www.openstudycollege.com , www.dbraining.com , www.onlineesol.co.uk www.birmingham.gov.uk/brasshouse
	Change in employment status	# of people move into employment	7	Average weekly wage of £247.60 = £11,290.32 take home pay per annum	Average weekly wage based on minimum wage scaled up to an annual figure (£6.19 per hour, 40 hour week = £247.60 per week / £12875.20pa) Monthly net / take home pay would be £940.86 after income tax and NI deductions - scaled up to £11290.32pa) www.payrollsite.co.uk online PAYE calculator 2012.
Landlord	More financially self sufficient tenants -	Reduction in staff time (hrs) spent chasing arrears	48	Cost per hour of staff time spent chasing arrears £61.31	This represents an assumption that people moving into employment will be in a better position to improve their rent arrears situations – as reflected by Ashram’s Tenancy and

	landlord spends less time chasing arrears				Estates Spreadsheet. The value is worked out from Accord Group data – average salary plus on costs for the staff housing team working on rent arrears and average amount of time spent following up individual cases of rent arrears.
	Improved profile and reputation for Ashram HA and the wider Accord Group	No. references to the service in internal and external communications	1	Cost of half page advert in trade press eg Inside Housing £1,849	Inside Housing Rate Card - http://www.insidehousing.co.uk/ihstory.aspx?storyCode=6502305 This represents the cost of placing a half page advert in Inside Housing, housing sector trade press to represent the value of improved profile and reputation for Ashram HA.
No. new partnership activities					
Expansion of similar services across Group					
State	Reduced reliance on state benefits	Welfare benefits paid to unemployed	7	£3640 pa	Estimate developed by nef of housing & council tax assistance £70pw ⁸
	Reduction in JSA	JSA paid to unemployed	7	£3473.60pa	£66.78 per week Estimate of JSA which was being paid out to 7 individuals who moved into employment (calculated according to their age and whether they are claiming as a single person or couple) https://www.gov.uk/jobseekers-allowance/what-youll-get

⁸ Nicholls, J and Mackenzie, S, Getting Out to Work Merseyside: A Social Return on Investment Analysis (2004)

	Increased tax take and national insurance	Change in tax take and national insurance payments as individuals move into employment	7	£2328.24pa with deduction of £425 to offset working tax credits £1903.24	<p>Increase in national insurance (Client & Employer) payments & Inland Revenue income tax. Calculated based on statutory rates on minimum wage working average 40hr week. Income tax payments of £952.80pa based on 810L tax code. NI payment (Client) of £632.04pa based on NIC table letter A NI payment (employer) of £743.40pa</p> <p>Sourced from: www.payrollsite.co.uk online PAYE calculator 2012. http://www.hmrc.gov.uk/ni/intro/basic.s.htm http://www.irishtraveller.org.uk/wp-content/uploads/2012/02/Irish_Traveller_movement_SROI_-_Evaluation2.pdf⁹ http://nicecalculator.hmrc.gov.uk/Class1NICs2.aspx</p> <p>Deduction Deduction of £425 made to offset working tax credits which individuals on low incomes may be eligible to receive. (HMRC tax credit entitlement tables - http://www.hmrc.gov.uk/taxcredits/people-advise-others/entitlement-tables/index.htm)</p>
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Table 6: Impact map – Financial Proxies

As a result of the project six clients have secured full-time jobs and two clients have secured part-time jobs. In terms of a reduction in the payment of state benefits and Inland Revenue and National Insurance contributions we have calculated this as equivalent to seven full-time jobs. As with all of the outcome calculations, we have not attributed this outcome solely to the work of the Ashram Employment Service. We have made attribution, drop off and displacement calculations informed by recent SROI reports and guidelines to rationalise the financial impact to the state (see section 8 which explains our rationale for impact calculations).

As part of the service users workshop the group discussed the value of the support received and we spoke about possible valuations which could be taken forward into the analysis. These discussions along with secondary research into proxies used in other similar SROI studies and reference to the VOIS database informed the choice of proxies for the service users. For the landlord we were careful to discuss our valuations with key representatives as the SROI analysis evolved to verify that the assumptions we made in terms of our valuation of advertising costs and rent arrears costs were judged to be fair and reasonable. For the proxies for the state as explained below we referred to other SROI studies and the VOIS database which contained proxies which had been used and accepted in the past as robust and reasonable.

Below we explain in more detail the decision making progress around the development of the financial proxies used. We acknowledge that SROI thinking is constantly evolving and as we conduct future analysis we intend to conduct more of our own research and broaden our evidence base to inform the development of proxies that are representative of the outcomes being reported.

⁹ Greenfields, G and Kaye, E, The Irish Traveller Movement in Britain – Traveller Women’s Community Development Programme, A SROI Evaluation, 2011

Service user – outcome 1

The first outcome for service users was for a change in personal wellbeing (self confidence). For this outcome we used a proxy relating to the market cost of confidence training. This proxy was used by nef in their SROI analysis of Coventry's Local Enterprise and Growth Initiative¹⁰ and is included in the VOIS database. This proxy represents a market-traded good to help people achieve increased self confidence, which is a measure of wellbeing. To account for the magnitude of change experienced by individuals we calculated 42.5% of the £1195 proxy figure which works out as £507.88.

Service user – outcome 2

For outcome 2 for service users (progress towards employment through CV support received) we used a proxy based on a market-traded good for the progress towards employment through CV support received. This proxy was found at www.CVconsultants.co.uk. The value covers the costs of preparing a CV and giving guidance on job seeking and the proxy has been previously used by nef and is also included in the VOIS database.

Service user – outcomes 3 & 4

For outcomes 3 and 4 for services users (progress towards employment through undertaking work experience and the completion of relevant training) we were keen to explore in greater detail the progress towards employment in relation to the value of this progress to service users and to employers. This could, for example, be in terms of the cost saving to an employer of an individual having completed relevant work experience and could relate to the reduction of employer time and capacity required through the induction process, level of support needed, and in terms of the individual's knowledge, recent experience and them already being accustomed to a work environment.

It is acknowledged in the Business in the Community report looking at the Social Return on Investment of Ready for Work (April 2012)¹¹, that finding robust data to inform the development of financial proxies for outcomes relating to improved employability is problematic. No such proxies are currently included on the VOIS database and from carrying out research into papers and SROI reports on similar topics, most organisations take the decision not to place a financial value on such outcomes although they do acknowledge the relevance and validity of outcomes around increased employability. This is clearly an area where there is significant interest and where as more SROI reports are completed, more widely acknowledged and accepted proxies will emerge.

In the Octavia Foundation's report 'Placing a Value on Work'¹² they state that:

"We have not sought to monetise the wider value of moving people closer to paid work in this report. However, many of the people who had not achieved employment by the end of the programme, nevertheless, took important steps towards work. The indirect benefits, particularly for those who took part in volunteering, training and work placements include: engagement in purposeful activity, increased motivation to seek work, job readiness when employment opportunities arise."

Whereas Business in the Community and the Octavia Foundation opted not to place a financial value on their outcomes relating to improved employability, we felt that these outcomes should be given a value and we have attached what we feel are conservative valuations. The proxies we have used are based on research we have carried out looking at existing SROI reports, discussions with service users and the Employment and Skills Coach, interviews with employers (some of whom have employed individuals who have previously engaged with the Employment and Skills Service) and with Organisational Development and work placement representatives from the Accord Group.

Service users - outcome 3

For outcome 3 (individuals who stated that the work experience they have undertaken has helped them progress towards employment) as part of the process of assigning a financial proxy we took into consideration the nature and duration of the work experience placements. The placements for

¹⁰ Coventry's Local Enterprise and Growth Initiative (LEGI), unpublished, 2008

¹¹ Inge, N, Social Return on Investment of Ready for Work, April 2012

¹² Octavia Foundation, Placing a Value on Work – A Social Return on Investment Report, 2012

individuals counted for this outcome were mainly in the education, retail and warehousing sectors. They included placements as teaching assistants and in charity retail shops.

To inform the development of our financial proxy we interviewed both service users and four local employers who work closely with Accord (through the Addventures enterprise and support agency) in order to develop an understanding around the value they place on recent and relevant work experience. Our decision making process involved looking at two alternative proxies to value this outcome and working with service users to decide which was most appropriate. Developing two possible proxies for this outcome was useful in gaining a sense of what was an appropriate value for the proxy and ensuring that the final proxy used was credible and plausible.

Service users spoke about how they felt the completion of work experience had helped them to progress towards employment and considered that it would be of value to their potential employers of the future. As part of the process of finding a credible proxy for this outcome we looked into the average number of days of work experience completed over a three month period for individuals reporting this outcome (which worked out as an average of 8 days). We used this three month period as a cut off as many of the work experience placements were completed within this time period and it was based on the assumption that the value to an individual of work experience (in terms of progression towards employment) would not necessarily continue to increase over a longer time period. This three month cut off was based on advice from the Employment and Skills Coach and verified with service users. We then discussed with service users developing a proxy around the minimum wage (minus deductions) payment for these days of work experience to represent the value to them of this work experience i.e. what their take home pay would have been for eight days work. This proxy worked out as £366.86 per individual reporting this outcome.

In order to gain a comparative proxy and to increase our understanding of whether the assumption that work experience completed by individuals would be valued by employers, we interviewed four local employers. Without exception the employers spoke very positively about work experience and although it wasn't a necessary requirement they felt it demonstrated an individual's work ethic and showed that they had taken responsibility to gain skills and knowledge for their own career development.

The employers estimated that the value of an individual having undertaken recent relevant work experience would be in the region of saving one day per week of staff time for a maximum of four weeks. This would be in terms of a middle managers' time. Research was undertaken into the average salary costs for middle managers in the relevant sectors (making the assumption that individuals would look for employment in similar sectors to those where they have undertaken work experience). The £399.74 proxy equates to four days salary plus oncosts for an average salary across the three sectors for middle managers or the staff member most likely to benefit from the reduction in staff support time required.

Before deciding on which of these two proxies to use we spoke to a sample of service users who had reported this outcome and they advised that they felt the proxy which related to cost savings to employers time was more appropriate. This was in part because the value was higher than the calculation based on average days worked based on minimum wage, and also because they felt it reflected an accurate approximation of the value to them of the work experience they had completed.

As we researched this calculation we did consider whether a new stakeholder was emerging and experiencing material change – in terms of employers who take on service users who have previously undertaken work experience – as there could be a value to them as a direct result of the service. After speaking to the Employment and Skills Coach and identifying whether any of the individuals who had moved into employment had also reported progress towards employment as a direct result of work experience (there was only one individual who reported this) we were confident that this material change was not sufficiently significant to warrant inclusion as a stakeholder as part of this analysis. This was backed up by employers stating that although work experience may help an individual in terms of making it more likely that would make the shortlist for a position, the key factors in deciding the right person for the job were more likely to be having a positive attitude and being motivated as opposed to having relevant work experience. This is an area on which we intend to continue to gather data and

report on in the future, so we can explore further the value to service users and potential employers of the future of work experience and individuals making progress towards employment.

Service users - outcome 4

For outcome 4 (the individuals who have stated that the training they have completed has moved them closer towards employment) we took into consideration the type and duration of training courses that the individuals who reported this outcome had completed. The training courses included a five-day intensive DIY (OCN accredited) course, Level 2 English and Maths courses, ESOL courses and an IT course delivered over six weeks.

Clearly there is variation in terms of the duration and level of course. However in order to assign a financial value to this outcome we have had to take the decision to use what we feel is a conservative financial value which reflects the increase in employability for a group of individuals each following different pathways and with differing aspirations in terms of employment.

From research into proxies used in other SROI and similar report we discovered valuations relating to similar outcomes and in particular one relating to certificates or qualifications obtained as a result of adult learning¹³. This was a contingent valuation of £947 which through discussions with the Employment and Skills Coach and service users themselves we felt was inappropriate to this analysis as it was an over estimation of the value of the progress made by individuals towards employment

Discussions with the Addventures team at Accord (Accord's in house employment support service) along with interviews with employers also informed our decision making in terms of a valid proxy to use. Although employers value training which an individual may have undertaken prior to starting work with them, what was more often stated as valuable was a positive attitude and the individual's motivation. Having conducting interviews with employers and the Employment and Skills Coach we opted to use a proxy related to potential costs of training (representative of the market cost of training courses irrespective of whether individuals actually paid this) as opposed to developing a proxy in relation to the value employers might place on individuals having completed a relevant training course.

It is important to acknowledge that a variety of training courses were completed by individuals who stated that the training they had done had helped them progress towards employment. We opted to use the average cost of a range of short courses which had been completed by individuals reporting this outcome as the basis for this proxy. These courses include Level 2 short courses in Maths and English, an ESOL course and an IT user level 2 short course. The costs correspond to the level and duration of courses that individuals had completed. In many cases the funding for the training was through government and specifically the Learning Skills Council but we can still value the training in terms of what it would potentially cost an individual. Data on this was sourced from a number of websites offering similar level and duration courses including www.openstudycollege.com, www.dbtraining.com, www.onlineesol.co.uk and www.birmingham.gov.uk/brasshouse. The average cost of training worked out as £349. This was verified as an appropriate value to carry forward in the analysis with the Employment and Skills Coach and both employers and service users.

As SROI becomes more widely adopted, monetisation will improve and there will be further scope for pooling good financial proxies, through the VOIS database, SROI Network and similar.

Service users – outcome 5

This outcome was service users experiencing a change in employment status. The financial proxy used for this outcome was based on an estimate of an average weekly wage and scaled up to a per annum figure. Our calculation was based on the £6.19 per hour minimum wage for individuals aged 21 and over, working on average a 40 hour week which produced a weekly gross figure of £237.60 and an annual salary of £12,875. Based on these figures, weekly net pay (take home pay after income tax and national insurance deductions) would be £247.60 per week, which, scaled up to an annual figure would be £11,290. In order to verify these figures we had detailed discussions with the Employment and Skills Coach into the employment which had been gained by individuals (including salary and hours of work).

¹³ Dolan, P & Fujiwara, D, BIS Research Paper, November 2012 (The SROI Network VOIS Database)

We also looked to existing research and reports which have been conducted by third party sources to verify our valuation. In their 2004 SROI study, nef used an estimate of an average starting weekly wage of £225 which scaled up to a comparable annual take home figure of £11,065.

Landlord – outcome 6

For the landlord outcome around more financially self-sufficient tenants and landlords spending less time chasing rent arrears we developed a specific proxy based on research and information held within the organisation. The financial proxy represents an assumption that people moving into employment will be in a better position to improve their rent arrears situation, and this is reflected by organisational data and in particular Ashram Housing Association's Tenancy and Estates Spreadsheet. The value of the proxy is calculated from Accord Group data on salaries and is based on the average salary plus oncosts for Ashram's staff housing team who work on rent arrears and the average amount of time they spend following up individual cases of rent arrears. Once calculated the value of and calculations used to formulate this proxy were verified by representatives from the landlord, both from Ashram's Housing team and the Organisational Development team, part of the wider Accord Group.

Landlord – outcome 7

For the outcome relating to improved profile and reputation for Ashram Housing Association and the wider Accord Group, we used a proxy based on the market cost of placing an advert in a key trade press. We conducted research into similar SROI analyses to gauge the type of proxies which had been used and acknowledged as credible to value this type of outcome. The SROI Evaluation into Craft Café conducted by Social Value Lab and Impact Arts¹⁴ was particularly useful as one of the stakeholders was housing association partners and one of the outcomes in this analysis focused on the publicity gained as a result of the programme. The subsequent proxy developed in the CraftCafe analysis was the cost of an advertorial in a key regional newspaper. This informed our thinking in the development of our proxy which was the cost of placing a half page advert in Inside Housing, a housing sector trade press publication. We discussed the credibility of this proxy with both the landlord and the Accord Group PR and Comms team who provided much of the indicator data for this outcome.

State – outcome 8

For the calculation of the first outcome for the state (reduced reliance on state benefits) we used an estimate that had been developed by nef based on the housing benefit and council tax assistance paid to unemployed individuals. This proxy (an estimation of £70 per week) was used in nef's SROI analysis 'Getting Out to Work on Merseyside' published in 2004¹⁵. The SROI Network's 'Guide to Social Return on Investment'¹⁶ states that 'the most credible proxies have been used before 'by third party sources with existing credibility' which was the basis for our decision making for this proxy. We did additional research around this proxy and considered an alternative valuation included in the WIKI VOIS database which was the 'value of 'passported' benefits: weekly housing benefits, council tax break received, free prescriptions and travel'. The value for this was £99.30 per week, based on 2008 prices and the proxy was used for a report commissioned by Business Action on Homelessness (BAOH). This report was carried out by nef and designed to find out what prevents homeless people from taking a job or staying in work, and what could encourage them otherwise. We chose not to use this proxy as although it used DWP data it was based on average rent in London, which we considered likely to be higher than average rents in the West Midlands. In order to verify our choice of proxy we discussed our valuation with relevant staff from Ashram and we also looked to Business in the Community's SROI of Ready for Work¹⁷ to consider the valuations they used in their breakdown of benefits to calculate the average out of work entitlements. This helped us to ensure that the valuation we decided to use was credible and that we were not over-claiming or over-stating the value of the change experienced.

State – outcome 9

For the calculation of the second outcome for the state (reduction in JSA paid) we based our proxy on an estimate of the level of JSA benefits paid to the unemployed. The level of JSA paid varies according

¹⁴ Social Value Lab, Impact Arts, CraftCafe Creative Solutions to Isolation and Loneliness, SROI Evaluation, August 2011

¹⁵ Nicholls, J and Mackenzie, S, Getting Out to Work Merseyside: A Social Return on Investment Analysis (2004)

¹⁶ Nicholls J, Lawlor E, Nietzert E, Goodspeed T (2009) A Guide to Social Return on Investment (London: The Cabinet Office) p97.

¹⁷ Inge, N, Social Return on Investment of Ready for Work, April 2012

to an individual's age (whether individuals are over or under 25) and whether they are claiming as a single person or as a couple. Using information held by the Employment and Skills Coach on the individuals who had moved into employment we were able to calculate the average amount of JSA which we would have expected these service users to have received prior to starting work. The service users who had moved into employment were primarily over the age of 25 and single (as opposed to claiming JSA as part of a couple) and the average amount of JSA paid worked out as £66.88 per week. In order to verify our calculations we carried out research into existing data and reports by third party sources. These included Tomorrow's People who used an estimate of £44 per week¹⁸ in their Getting out to Work in Merseyside SROI report from 2004 and Business in the Community's SROI on Ready for Work¹⁹ from 2012 who used a calculation of £64.30 per week based on the DWP Tax Benefit Model and the average entitlement based on the percentage of their clients claiming each benefit.

State – outcome 10

For the calculation for the third outcome for the state (increased tax take and national insurance) we carried out research into existing SROI reports which revealed that this proxy is included as part of the VOIS database and has been used in other recent reports²⁰. This proxy relates to the amount paid to the state by an individual (and employer) in terms of national insurance and income tax when they move into employment, based on minimum wage. There are limitations however with this proxy, notably in terms of individuals who may move into work and start making national insurance payments and paying increased taxes, but if the employment is classed as low income, they may be entitled to working tax credits, which may offset some of the increased payment to the state. There is likely to be a saving to the state in terms of individuals moving into work (including low income roles) but the saving is not likely to be as clear cut as this proxy suggests.

In order to address this limitation, we have amended the proxy and made appropriate deductions to account for where individuals may be entitled to working tax credits. As good quality and detailed data is held on the Employment and Skills Service clients (including details of the benefits individuals claim and their family circumstances along with the nature of employment individuals moved into) we were able to take into consideration in our calculations the extent to which receipt of working tax credits (and child working tax credits) would offset the increased tax take and national insurance claimed. It is vital to ensure credibility of all proxies and we felt that making these deductions was important in order to avoid over-claiming.

We have carried out research into other data sources and SROI reports in order to inform our decision making around all proxies and in particular those relating to the state.

Some research has been done around the costs of supporting young people into work including a report published in 2002 'Estimating the Cost of Being Not in Education, Employment or Training at Age 16-18'²¹ which provides a breakdown of estimated costs for people with a number of employment barriers. Based on this report a cost of £5,500 was used in a forecastive SROI report for the Scottish Investment Fund to represent the public finance costs in supporting NEET young people (details of this proxy are on the VOIS database). Proxies have also been developed from valuations on the 'Troubled Families Costs Database'²² concerning the fiscal benefit from a workless JSA claimant entering work (£8218). However for this analysis we have opted to use three proxies relating to savings to the state which are included on the VOIS database and have been used in other published SROI reports. We do recognise that SROI thinking is constantly evolving and for future analyses we would be keen to explore other potential valuations in relation to savings made to the state through individuals moving into employment. It is our intention to do further research around the costs to the state of managing people who may have been out of work for a long period, and look at developing a proxy which considers the

¹⁸ Nicholls, J and Mackenzie, S, Getting Out to Work Merseyside: A Social Return on Investment Analysis (2004)

¹⁹ Inge, N, Social Return on Investment of Ready for Work, April 2012

²⁰ Greenfields, G and Kaye, E, The Irish Traveller Movement in Britain – Traveller Women's Community Development Programme, A SROI Evaluation, 2011

²¹ Godfrey, C et al, Estimating the Cost of Being 'Not in Education, Employment or Training' at Age 16-18, University of York, 2002

²² A valuation on the VOIS database taken from the 'Troubled Families Cost Database' compiled by new Economy for Greater Manchester City Council

other resources involved. Validation of proxies and assumptions is also problematic when it comes to outcomes for the state, as speaking to individual representatives is not always possible. This is something we would need to consider for future analyses and particularly in terms of verifying that proxies we were suggesting were appropriate and representative of the actual and meaningful changes taking place.

8. Impact

Impact measures provide a way of estimating how much of the outcome would have happened anyway and what proportion of the outcome can be isolated as being added by service activities. We are interested in the ultimate impact of the Employment and Skills Service and this has been determined with reference to the effects of attribution, displacement, deadweight and drop-off. We use these impact measures to assess whether and to what extent the outcomes we have analysed result directly from the Employment and Skills Service.

Establishing impact is important as it reduces the risk of over-claiming and means that the story will be more credible. It is only by measuring and accounting for all of these factors that a sense of the impact that the activity is having can be gained. Otherwise there is the risk of investing in initiatives that do not work, or do not work as well as intended.

There are four aspects of establishing impact:

- Attribution – how much of the outcome was caused by the contribution of other organisations or people
- Displacement – what activities or services are displaced
- Deadweight – how much of the activity would have happened anyway
- Drop-off – the decline in the outcome over time (only calculated for outcomes that last for more than one year).

Each of these aspects is normally expressed as a percentage and our impact map spreadsheet allows us to input these percentages and calculates the monetary values to be deducted. For every decision taken we have kept supporting information that explains the assumptions that we have made in the study.

Our stakeholder engagement activities provided the opportunity to ask service users directly about the impact the Employment and Skills Service had had on them, who else had provided support and how beneficial they felt the service was. This information was valuable in informing our impact calculations. In the future we would refine the questions asked to gather even more information by asking specific questions, along the following lines:

- How long do you think this change will last? (Duration & drop off)
- What other ways might the change have come about? (Deadweight)
- Was anyone else involved in making these changes happen? If so, who were they and how much would you say is down to them? (Attribution)
- What would have happened if you hadn't been able to use this service? (Deadweight)

The data collated from these questions would then be linked to the responses from the agencies, such as support workers, to gain a full picture.

8.1 Deadweight

Deadweight is a measure which describes the amount of the outcome that would have happened anyway, even if the Employment and Skills Service had not been in operation.

It would be wrong in our analysis to attribute all jobs gained and personal wellbeing improved by tenants if some of those people would have got jobs or become more self confident anyway. We only count those jobs and changes that occurred over and above what would have happened in the absence of Ashram's Employment and Skills Service.

In establishing deadweight and through exploring deadweight at stakeholder workshops, it was considered that in most cases the tenants would have done very little without some employment

intervention. There is little else available that can meet all the requirements of residents looking for employment opportunities. The main service used by the client group is Job Centre Plus and due to restricted resources and very stringent rules and outputs to meet, the service is limited to offering generalised services to all its customers. In most cases, if Ashram's Employment Service had not been an option it has been estimated that there would have been approximately 5% of tenants who would have experienced a positive change to their personal wellbeing. The workshops identified that having the service engaging with the client in their locality or even home was a key factor to its success and helped build motivation and personal wellbeing in terms of self confidence.

For the outcomes around individuals moving into employment (for the tenants, the landlord and the state) we opted for a deadweight figure of 12%. This percentage is based on information gathered from similar SROI studies²³. Deadweight figures range widely across similar SROI reports (from 10-60%) depending on the nature of the clients using the service in relation to whether they are likely to be disadvantaged and socially excluded, and the likelihood of them moving into employment without specific support. In nef's 2003 report (The impact of Tomorrow's People's Working it Out pilot study: April to November 2003) they used a deadweight figure of 25%.

The basis for our 12% calculation is that our tenants tend to be some of furthest removed from employment and are typically harder to reach than the general Job Centre Plus population. Amongst our tenants there are high rates of unemployment, entrenched worklessness and benefit dependency and factors such as poor health, low educational attainment and low skill levels prevail creating multiple disadvantages for individuals. Our workshop results picked up on a mistrust of institutions which impacts negatively on tenants' circumstances and removes them even further from the labour market. We have consciously used comparatively high drop-off percentages for these outcomes to reflect the challenges faced by tenants who have moved into employment in sustaining employment.

8.2 Attribution

Attribution is an assessment of how much of the outcome was caused by the contribution of other organisations or people.

Attribution was difficult to judge as details of the support offered to clients outside of Ashram were limited. Instead, we explored attribution with participants at the tenant workshops. A question was asked, which was used as the basis for our attribution calculations, around what percentage an individual would allocate credit to other services in terms of their achievement of outcomes around moving towards employment and increased personal wellbeing. We used the average figures from participants at the workshops to inform the 30% figure added to the impact map.

In terms of moving into employment, the tenants who attended the workshops all reported that the Employment and Skills Service was absolutely critical to them achieving the outcome. Without the service they all felt they would not have been successful in finding work. This was backed up through questionnaire feedback. For this reason we opted for a 10% attribution rate for individuals moving into employment and the related outcomes for the landlord and the state.

8.3 Displacement

Displacement is an assessment of how much of the outcome displaced other outcomes. It does not apply in every SROI analysis. However, as this project is about supporting tenants into employment and we have counted the contribution of decreased benefit payments and increased taxes in the analysis, we have considered that for the state outcomes, displacement is relevant. From the point of view of the state, the reduction in benefits and increase in taxes would have a displacement rate as the jobs that people have moved into are most likely jobs that are now denied to someone else that could have made

²³ FTI Consulting - measuring the social impact of the Tomorrow's People welfare to work and youth programmes between 2006/07 to 2010/11, June 2011

similar contributions. This is irrespective of any other economic benefits to the individual or community that this project might produce.

For the three outcomes for the state we have opted for a 40% displacement rate. Nef and others are currently working on specific guidance on displacement and deadweight in relation to employment support programmes and recommended displacement rates for similar projects range from 20 – 80%. The extract below (from nef guidance) refers to three sources each recommending a different rate. We have opted for a median estimate of 40%.

“According to the DWP Cost-Benefit Analysis Framework²⁴, Greenberg et al (2010) suggests that for supply side programmes (employment support as opposed to subsidies to employers), a sensitivity level of 20% can be assumed, although this is a very general level and programmes in different regional areas may be different.

According to a working paper by DWP Improving DWP assessment of the relative costs and benefits of employment programmes²⁵, the short run substitution (displacement) effect can be assumed to have a reasonable upper bound of 60% and a lower bound of 30%. The effects of employment support programmes are also assumed to diminish over time when the economy is growing.

In respect of the current economy and that according to CESI, in 2010 there were 5.4 unemployed people per vacancy²⁶, it can be assumed that a more conservative estimate of the displacement should be taken. The current climate of high unemployment and low economic growth increases the chance of displacement of the employment opportunity and the tax revenue to the state, therefore a median estimate of 45% displacement of the higher range may be assumed.”

8.4 Drop-off

For outcomes that last longer than one year, it is likely that the effect of the outcome will diminish over time. The outcome will be influenced by other factors and it will be less attributable to that activity.

Drop-off is used to take account of this and the reduction is calculated by deducting a percentage from the outcome. These percentages are detailed on the impact map. We have been fairly conservative in the duration of outcomes and purposefully generous in the drop-off rate's we have applied in order to avoid over-claiming.

For the 'moving into employment' outcome for tenants and the corresponding reduction in reliance on state benefits, reduction in JSA payments and increased National Insurance and tax take for the state, we have opted for three year durations. We have assumed that these tenants will sustain their employment for this period and that a proportion of the ongoing impacts can still be attributed to the Employment and Skills Service. However as time goes on the amount of outcome will be more likely to be influenced by other factors, so the amount which can be attributed to the service is less – this is the drop-off. We also need to account for the percentage of tenants who may move into employment but won't sustain it beyond one year. This could be through the employment ending or the individual's situation changing and they may return to claiming benefits. To identify the drop-off for these outcomes we have looked at similar employment support programmes and the percentage of participants who sustained employment beyond 12 months. Business in the Community conducted a recent SROI study²⁷ and used a 50% drop off rate which reflected the fact that 64% of their clients who gained employment through their Ready to Work programme sustained it into a second year and 37% of clients on their 'all-time database' who gained employment sustained it for longer than 12 months. We opted to

²⁴ Cost-Benefit Analysis Framework, DWP 2010, Page 21, <http://research.dwp.gov.uk/asd/asd5/WP86.pdf>

²⁵ Improving DWP assessment of the relative costs and benefits of employment programmes, DWP 2011, Page 21, <http://statistics.dwp.gov.uk/asd/asd5/WP100.pdf>

²⁶ Centre for Economic and Social Inclusion 2011, Chart 13, http://www.cesi.org.uk/statistics/previous_months/lms_jan2011

²⁷ Inge, N, Social Return on Investment of Ready for Work, April 2012

use a similar 50% drop off rate which is applied to the benefits for these outcomes over the three year benefit period.

For the change in wellbeing (self confidence) outcome we have a three year benefit period and have opted for a 15% drop-off rate. The rationale for this is that without exception the tenants we spoke to who had used the Employment and Skills Service felt that the change to their self confidence was considerable, along with the experience and training they had undertaken. They felt in a considerably better position personally with increased skills, confidence and motivation going forward. It will be important to revisit the duration and drop-off figures against this outcome in the future.

Stakeholder	Outcome	Deadweight proportion %	Attribution incidence %	Displacement proportion%	Drop-off %	Comments /Justifications
Unemployed service users	Change in personal wellbeing (self confidence)	0.05	0.3	0.0	0.15	The 10% attribution figure (for change in employment status) was informed by tenants' feedback at stakeholder workshops where they did an exercise weighing up the attribution of different individuals and organisations in relation to their individual journey and the outcomes they had achieved. Tenants felt that the Service was the key factor in them moving into employment, but in exploring the outcomes around progress towards employment and change in personal wellbeing, they felt other people (notably family, friends and to a small extent JCP were also attributable) – hence the 30% figure.
	Change in progress towards employment through CV support received	0.12	0.3	0.0	-	
	Change in progress towards employment through relevant work experience undertaken	0.12	0.3	0.0	-	
	Change in progress towards employment through completion of relevant training	0.12	0.3	0.0	-	
	Change in employment status	0.12	0.1	0.0	0.5	
Landlord (Ashram)	More financially self sufficient tenants - landlord spends less time chasing arrears	0.00	0.1	0.0	0.5	The tenant becoming more financially self sufficient is deemed to be a direct result of the individual moving into work, which is in itself a result of the Employment and Skills Service being offered to tenants. The 10% attribution figure was informed by tenants' feedback on the support they received to move into employment. The 50% drop-off rate relates to the drop-off rate applied to the tenants and state in terms of the individuals moving into employment and the sustainability of that employment over the three years duration.
	Increased awareness of service and publicity gained leads to improved profile and reputation for HA	0.00	1.0	0.0	-	The publicity and profile created is only deemed to last for one year, whilst the Service is operating. Deadweight and displacement are not considered to be relevant to this outcome.

State	Reduced reliance on state benefits	0.12	0.1	0.4	0.5	<p>High displacement figure of 40% based on NEF recommendations around displacement for employment support programmes.</p> <p>High drop-off figure (50%) to reflect the likelihood of some people who move into employment not sustaining work.</p> <p>Attribution rate of 10% based on feedback from tenants on the support they received and who they felt played the most significant role in their move into employment.</p> <p>Deadweight proportion of 12% based on external SROI reports on similar services (SROI Ready for Work²⁸) and our tenants tending to be harder to reach than the general JSA population and often experiencing multiple barriers to work.</p>
	Reduction in Empmt Support Allowance	0.12	0.1	0.4	0.5	
	Increased tax take and national insurance (with deduction for working tax credit payments)	0.12	0.1	0.4	0.5	

Table 7: Impact Calculations and Justification

²⁸ Inge, N, SROI of Ready for Work, Business in the Community, April 2012

9. Social Return on Investment

The Social Return on Investment (SROI) value is expressed as a ratio of return and is derived from dividing the value of the impact (referred to as the benefits on our impact map) by the value of the investment.

After attribution, displacement and deadweight deductions have been made, the costs and benefits paid or received over different time periods (according to the duration of the outcome and the drop-off rate) are added up. In order that these costs and benefits are comparable a process called discounting is used. The value of benefits is adjusted to reflect the Present Value of the projected outcome values. Discounting is applied to those values that have been projected for longer than one year. The interest rate used to discount the value of future benefits in this case is 3.5% as recommended in HM Treasury's Green Book.

There is ongoing research in this area of SROI both in terms of the interest rate used (most organisations opt to use either 3% or 3.5%) and in terms of the short-termism which discounting can be perceived as encouraging.

The total impact (at the end of the one year period which we have considered) of activities identified by this analysis is £199,284. The total Present Value for the Employment and Skills Service, at a discount rate of 3.5% is £196,188. This represents the total value created by the Service whereby the earning capacity of the amounts in the future is discounted.

$$\frac{\text{Total Present Value}}{\text{Total inputs}}$$

This gives a Social Return on Investment of £5.19 : £1

$$\frac{\pounds 190,370}{\pounds 36,689} = 5.19: 1$$

This means that for every pound of investment in Ashram's Employment and Skills Service, £5.19 of social value is created.

This is the most common way of presenting a Social Return on Investment ratio and is the key overall figure produced by this analysis.

However, if you invest money, in a savings account for example, you would normally deduct the initial investment from the final figure in your account to consider the return on your money. This is the net SROI ratio. So, if the initial investment (the total inputs) is deducted from the Present Value to give the Net Present Value and this is then divided that by the value of the inputs, the net social return for this analysis will be:

$$\frac{(\pounds 190,370 - \pounds 36,689)}{\pounds 36,689} = 4.19: 1$$

10. Sensitivity analysis and verification

The results presented in this report are based on variables and assumptions according to available evidence, including qualitative data on the experience of stakeholders. It is therefore prudent to review where these decisions have had a significant effect on the overall SROI figure in order to ensure that the results are robust.

A sensitivity analysis involves altering the figures in the impact map to assess the extent to which our results would change if we adjusted our assumptions.

Area of impact on final figure	Variable adjusted	Previous level	Adjusted level	Final SROI figure	% impact on SROI figure
Proxy for improved personal wellbeing – cost of confidence course	Halving the value of the proxy used to measure the increased confidence (42.5% of £1195 training course)	£507.87	£253.94	£4.76	-8%
Attribution	Varying the attribution figure to show differing levels of contribution to the outcomes for the tenants from other agencies / individuals	30% (for outcomes for the tenant – improving personal wellbeing and progress towards employment)	15%	£5.42	+4%
			45%	£4.96	-4%
Displacement	Varying the displacement levels to account for differing recommendations for displacement calculations for employment support programmes	40% (for outcomes for the state)	20%	£5.78	+11%
			60%	£4.60	-11%
Drop-off	Changing the drop-off rates to see what the impact would be if more, or fewer clients sustained their employment following their engagement with the Service	50% (for outcomes based on change in employment status for the tenant, landlord and the state)	75%	£4.17	-20%
			25%	£6.49	+25%
Deadweight	Varying the deadweight figure to show differing levels of impact in relation to the outcomes for the state, landlord and tenant for individuals moving into work – that would have happened without the Employment and Skills Programme	12% (for outcomes based on change in employment status for the tenant, landlord and the state)	20%	£4.64	-10%
			40%	£3.26	-37%

Table 8: Sensitivity analysis

The sensitivity analysis shows that if the already conservative values used in this analysis are reduced even further, the SROI ratio for the service is unlikely to fall below £3.26 : £1. This value would be reached if we increased the deadweight figure used for individuals moving into employment to a much higher level of 40% (applied to outcomes for tenants, the landlord in terms of reduction in rent arrears and the state in terms of reduction in DWP payments and increased tax take).

We also looked at the impact on the SROI ratio of variable drop-off rates to test how sensitive the figure was to our clients sustaining employment for future years. With an increased drop-off rate of 75% our SROI figure fell to £4.17 and with a lower drop-off rate of 25% our SROI figure rose to £6.49. This demonstrates that in order to have an even more positive impact on society, the Employment and Skills Service needs to focus on ensuring that tenants sustain their employment for as long as possible. This is something that the Employment and Skills Coach currently does through ongoing support – but it is an area which in light of this analysis is vital and needs to be continued and revisited to assess whether it could be improved.

The sensitivity analysis is aimed at understanding the changes that might result if different assumptions were used. It is important to note that, through all of the sensitivity analyses, the resultant SROI ranged from £3.26 to £6.49, with an overall estimate of £4.89. The sensitivity analyses indicate that even with the most stringent of assumptions, the Employment and Skills Service represents a good return on investment.

11. Conclusion and recommendations

This SROI analysis has demonstrated that Ashram's Employment and Skills Service has been highly effective and brought about substantial positive changes for the tenants who have used the service. Overall the Employment and Skills Service has created a substantial social value of £5.19 for every pound of investment. This figure is based on rigorous research and best assumptions.

Ashram's Employment and Skills Service operates in a very complex arena characterised by the interplay of many services and agencies. This SROI analysis demonstrates the difference Ashram's Employment and Skills Service can make. Going forward there is the potential and opportunity for Ashram to play an extended and valuable role in this arena. With increased funding and guidelines for a more measured and integrated approach to the commissioning and operation of employment and skills programmes, the current fragmentation and isolation in the system could be avoided.

It is worth noting that the benefits attributed to the Employment and Skills Service are likely to be greater than currently reported as it was beyond the scope of this study to measure impact on the support workers and clients of support workers who have now started to benefit from employment and skills support. These are aspects that we would seek to address in future analyses and in terms of developing the monitoring systems and data collection through the service.

There are a number of approaches to using this information to inform decision making, ranging from operational improvements, to scaling up the service and developing Ashram's wider offer around employment interventions and support.

11.1 Verification

Verification of the results is an important part of the SROI process. Our approach to verification has involved two strands. Firstly through our dissemination strategy and receiving feedback from stakeholders on how effective they feel the analysis has been and secondly through seeking SROI Network assurance for this report.

Through our dissemination strategy (see below) service users including both those who have and have not been involved in this analysis will receive a summary of the key findings of this report. This will be presented to service users by the Employment and Skills Coach who will be able to provide those who may not be familiar with the analysis with the background and context to the research. As part of the regular contact meetings the Employment and Skills Coach will ask service users directly for their feedback and comments on the findings from the analysis. All views expressed will be recorded and used to ensure the validity of this report, the way in which the report is used by Ashram and the next steps in terms of this report informing the future development of the service.

Ashram has taken the decision to submit this SROI report for assurance. Assurance means the analysis has been independently checked by qualified assessors and assured by a panel to have been prepared in line with the principles of SROI and is therefore to a consistent standard. This is particularly important to Ashram as we are keen to share the findings of the report externally beyond the organisation and the Accord Group.

11.2 Dissemination

Producing a final report, using the knowledge and learning and embedding the changes are crucial stages of the SROI process. It is important that the findings are reviewed by the key stakeholders, notably the service users and landlord and that the information is acted upon to inform future decision making.

This report has been presented to Ashram's Senior Management Team and will in turn be presented to the Chief Executive team for the wider Accord Group. It is expected that the findings will not only

influence the business plan and data collection systems for the Employment and Skills Service but also inform decisions and recommendations around data collection and impact measurement at a Group level.

This report has also been presented to the AddVentures team, part of the Accord Group, that offers a comprehensive employment and enterprise support programme for residents. The AddVentures team will be rolling out the learning from this report and passing on the key findings. They will also be implementing the recommendations with the four new Employment and Skills Coaches who have recently been appointed for other partner housing associations within the Group and using this report to inform decisions about the future direction of the service(s).

A document summarising the key findings of this analysis is being prepared and will inform new promotional material on the service which will be circulated to service users and other residents. We will ensure that all service users who were engaged through the process will receive this. A write up of this SROI analysis written by a resident who had been involved in the stakeholder engagement was included in the 2012 Resident Annual Report. A write up of the SROI process and the key findings from the report will also be included in the Accord Group internal staff newsletter and external residents' newsletter – distributed to all residents across the Group.

11.3 Recommendations

This report makes a number of evaluative recommendations for the service and encourages the reader to seek how this analysis can not only prove the difference the Employment and Skills Service makes, but also improve it. We have also included a number of recommendations for the wider Accord Group in relation to embedding SROI principles more widely across the Group and at a more strategic level.

The impact map which we have developed as part of this analysis should be used as a basis to inform the next strategic plan for the service and it also provides quantifiable information on the value for money of each aspect of the service. This information should be used when deciding on the future direction of the service within Ashram and as part of the wider Group.

We have grouped the recommendations below into two sections:

- Employment Service Recommendations
- Accord Recommendations

11.4 Employment Service Recommendations

Personalised, flexible one-to-one support is the key to success

To ensure the quality of the service continues current engagement figures would need to be maintained, on the understanding that if these were to be stretched, this would by default weaken the one-to-one personalised approach. There was overwhelmingly positive feedback on the performance and general competence of Ashram's Senior Employment and Skills Coach and in particular, clients reported that they responded well to the Coach's friendly and encouraging (but not overbearing) attitude. The general indication was that people felt that they had discovered a friend, something they had not necessarily expected to happen when first accessing the service. The ability of the Coach to engage, build rapport and establish relationships based on trust cannot be undermined and is deemed integral to the success of the overall service.

Creating job opportunities for our tenants

When asked what would, or has had the greatest impact, for the majority of tenants, it was about securing work experience so they could enhance their CV, which led to the highest impact of actually securing a job offer. The Senior Coach had advised that whilst some tenants had successfully acquired jobs within the Group this had been challenging due to limited opportunities. There is exciting potential for increasing the creation of social value as stronger linkages develop between the Employment and Skills Service and Accord Group's in-house Addventures agency.

Through this analysis it has been possible to look at the additional social value generated by the service of moving more individuals into employment. Based on the SROI ratio of £5.19 it is possible to calculate that for every additional person who moves into work, the SROI ratio would increase by 11%. This figure has been calculated based on seven full time roles being achieved and it will prove useful in demonstrating and evidencing the significance and value of what the Accord Group can offer in terms of creating job opportunities for tenants.

The Accord Group operates a comprehensive employment and enterprise support programme for its residents under the umbrella of the AddVentures agency. The purpose of AddVentures is to empower residents and communities through personalised support and guidance that supports them to achieve their aspirations and move towards financial independence. An important strand to this work has been reviewing the Group's procurement and supply chain activities to secure partner and supplier corporate social responsibility commitments to capitalise on its £65m turnover and effective purchasing power. To ensure this is embedded the Group has changed the way it buys services to reflect how Accord and its suppliers together can improve the economic, social and environmental wellbeing of the area. The Group is not only assessing for value for money and service quality, but is now assessing the corporate social responsibility offer with an equal footing. The Group is currently working with new suppliers that have been awarded contracts and linking them up to the AddVentures agency to ensure these work opportunities are passed to our residents. In 2012, AddVentures has engaged with 20 suppliers, (including small local providers to multinational corporate businesses) who are offering a wide range of support including work experience, training and apprenticeships. The target is to increase provision in years two and three to include existing suppliers and non-providers in localities that are committed to the same agenda.

Scaling up through frontline delivery

We understand that in an effort to achieve wider reach the aspiration is to up-skill all frontline workers in basic employment and skills advice. However, this would be on the basis that core housing functions such as rent collection, repairs, maintenance and customer service would not be compromised. This would serve to release the Senior Coach to concentrate on those tenants furthest away from the job market where more intensive one-to-one support is needed.

However, before scaling up we would advocate that lessons from this evaluation are heeded. This relates to the time invested in the training of support workers in the provision of basic employment and skills advice. As part of this evaluation we would have liked to measure the impact of Support Workers but were not able to due to the short amount of time during the period for which Support Workers had been trained, time constraints and critically lack of data. Moving forward we would need to fully understand:

- How the Support Worker's client base differs to that of general needs tenants.
- Support Workers existing knowledge of employment and skills to see if and how this had been bolstered through training.
- The purpose and scope of client support plans to better understand how employment support would contribute to priorities and target setting.

All of the above would also need to be underpinned by a commitment by any person carrying out this guidance role to monitor and track their clients to help record individuals' journeys and their direction of travel.

In relation to health and social care services offered by Ashram (and across the wider Group), funders, such as Birmingham City Council, are implementing frameworks that look at commissioning services based on outcomes achieved by providers. Going forward it will be imperative that services we provide are strongly aligned to these frameworks. Our approach to combating worklessness is an example of where our services (i.e. the Employment and Skills Service) can impact on the outcomes that are deemed a priority by local authorities. The Supporting People team within Birmingham City Council are currently looking to pilot a payments by result model that looks to provide a suite of 'mandatory' outcomes that providers and service users need to work towards. Currently under discussion is the

inclusion of a mandatory outcome that focuses on worklessness, education and training, and work undertaken by support staff would help contribute to this.

Within the health and social care team at Ashram, the importance of using such an outcome focusing on worklessness, education and training is already acknowledged - in terms of the impact on a users health and wellbeing as well as helping them to move onto or sustain living independently. As a consequence Ashram has provided training to frontline support staff in equipping them to become 'mini jobs and skills coaches' and this has helped customers to access a range of interventions and advice to assist them in becoming job ready.

Prioritisation of clients

The Employment and Skills Service has clearly made a difference to those individuals that have accessed advice and guidance. However, on the basis of this evaluation, we feel that there is an opportunity to further refine the service so that it can achieve maximum impact and a higher SROI ratio. Whilst we would advocate that the actual design of the personalised one-to-one service remains as it evidently works, we would suggest that a targeted approach is taken, prioritising the needs of unemployed tenants over individuals simply wanting to develop their skills base and career pathway. This is predicated on the scale of returns that can be achieved by moving people into actual jobs through state savings i.e. benefits and tax take along with returns to the landlord by minimising rent arrear levels. This relates to freeing up staff capacity and time spent working on rent arrears which in general can account for up to 70% of a Tenancy and Estates Officer's time during a weekly period.

Targeting neighbourhoods

Clients were dispersed across the geography of Ashram's operating remit so isolating returns in terms of a local economy or area could not be derived. It would be interesting to see if and how the service might be targeted when looking at Ashram's priority neighbourhoods where high unemployment permeates. Perhaps this could be explored further by testing an approach linking in with the micro-neighbourhood development pilot in Bordesley Green.

Reviewing monitoring system

The current monitoring system is robust and well managed and without such a comprehensive system the ability to carry out an evaluation of this type would have been much more difficult. Following this pilot we now have an opportunity to review the system to ensure it is fit for purpose. We would recommend the following actions:

- Wider measurement is needed to understand the relationship that exists between tenants moving into jobs and their ability to pay their rent so that we can be more confident of savings being made in actual terms.
- Health and wellbeing measures should be incorporated into the service's monitoring systems - so that related outcomes can be fully mapped and evidenced in recognition that for many people moving into work there will be tangible benefits.
- We recognise that the service has only been established for one year, and would recommend that clients continue to be tracked once they leave the service. These could take the form of ongoing follow-up checks to understand the longer term impact and would help inform the duration rates assumptions.
- In terms of data collection, and in particular where we have used binary constructions in the analysis, we would recommend looking at the opportunities for putting into place a long-term distance travelled evaluation system to monitor the impact of the service.

Ongoing monitoring

As with all analyses, this evaluation has for some measurements taken a representative sample for some of the indicators (not all of them as, for example, the data collection generated by using the Outcomes Star with all clients is excellent) and illustrated the impact if that sample were to be scaled up to all stakeholders who engage with the service. It would be beneficial for the Employment and Skills Service to continue to conduct monitoring and evaluation on a representative sample in order to monitor change over time.

11.5 Accord Recommendations

Service design and project management

For the purpose of this pilot the SROI methodology was applied in an evaluative context, however it can also be used to forecast a service's projected impact. It can therefore provide an excellent project management cum business development tool, which can be used when designing and planning for a new project or service. It achieves this by mapping the 'theory of change' which the project is seeking to achieve and from that process generates well formed outcomes and impact assessment. Most recently this methodology has been deployed when designing Birmingham's Improving Financial Confidence BIG Lottery funded programme 'Pay Ahead, Stay Ahead' to develop project outcomes and performance indicators. This three year partnership project aims to improve the financial confidence of Birmingham's youngest tenants in the broadest sense so they are better equipped to manage and sustain their tenancies. Innovative techniques will be used and learning opportunities offered to engage with 6,000 first time social housing tenants aged 16-24 across Birmingham. An integrated package of financial capability training and support will be offered, delivered using a person centered approach. The design of this project will ensure that customer journey profiling strongly features to monitor and track every young person that accesses and participates in the programme.

Scoping the 'theory of change' must be carried out directly with stakeholders to fully understand and map where any change takes place. This is so important when we consider that often we are the furthest away from any change being generated and so are less likely to understand change ramifications and its full impact on an individual or the wider community. This disassociation could lead to incorrect assumptions being made when trying to assess a service's likely impact.

Stakeholders input is central to the SROI process and could indicate a revolution in how we as a Group develop and maintain customer relationships moving forward, and how we might want to consider services such as resident engagement as a means of capturing customer journey intelligence.

Should the Group decide to embed the SROI principles at a strategic level we are confident that it would help us as a Group to start growing a rich evidence base for our projects and services. It will enable us to better track and measure our social and environmental impact so this can be converted into financial data. In the context of the 'payment by results' culture, the benefits of this approach are considerable and will help us to better position ourselves for new commissions and tender opportunities in an ever growing competitive market; where new investment models such as social impact bonds are continuing to evolve. By default this will also provide leverage for increased PR and marketing opportunities as we can better profile our impact and reach. This is paramount for not only our own organisation but also the wider housing sector as we are able to put a financial value on the extensive social investment activities we lead on our in local communities demonstrating our own value to all stakeholders including central government.

It is important to note that whilst the SROI framework can be applied to evaluate a service or project's impact, this can only be carried out if there is access to robust data and intelligence whether that applies to project outputs, budgets, or most importantly the beneficiaries. Data collation and analysis is paramount and is considered a key determinant in achieving a full evaluation. We appreciate that this might be more difficult in some areas where there may well be a dependency on certain systems, which may not give us accurate and timely data when required. Using the findings from this analysis to inform discussions and decision making around impact measurement and data collection at a Group level is going to be an important step towards as a Group having the ability and evidence in place to define and demonstrate its social impact and the difference it is making.

Appendices

Appendix 2: Audit Trail - Stakeholders

Stakeholder and how they effect or are affected by the activity	Changes experienced - positive and negative	Included/excluded?	Method of involvement?	How many?	When?
Tenants (users of the service)	Increased confidence, more job ready, secure work experience and paid employment, skills development, (financial wellbeing?)	Included	Customer feedback questionnaires	10	February 2012
			Telephone interviews	5	February 2012
			Workshops (including all participants filling in additional questionnaire)	2 x workshops with 8 service users participating.	21.02.12 (Ribbon Court, Coventry) 22.02.12 (Phoenix offices, Birmingham)
Ashram (landlord)	Increase in rental income (for those participants securing paid work). There could also be other non-intended changes such as a reduction of ASB issues.	Included	Email response to key questions	Amanda Nicholls Director of Ashram, Jas Bains, CEO Ashram, Pritesh Dumasia, Housing Officer	February 2012
			One-to-one interviews	Director of Ashram, Amanda Nicholls CEO of Ashram, Jas Bains Zoe Jubert, Employment and Skills Coach	April 2012
			Informal interviews	Muna Choudhury, Head of Care and Support, Claire Morrall, Senior PR Officer, Jon Maybury, Head of Housing, Kally Bharti, Jobs and Skills Coordinator, Accord Group,	March – June 2012

				Rachel Perks, Employment and Skills Coach, Irene Casserley, Volunteering Coordinator	
The state	Potential for reduction in benefit payments and increased state income from taxes where people are successfully supported into paid work.	Included	Secondary data and intelligence		
Family & friends	Potential increased wellbeing as a result of their family member/friend's increased confidence or experiencing an improvement in their own financial status.	Excluded	Six telephone interviews conducted with family of service users and additional interviews with service users to explore materiality and whether this stakeholder group should be included / excluded	6 telephone interviews plus one-to-one discussions with service users	
Support Workers	Increased skills and knowledge, so they are better equipped to support their own client base around employment and skills – improved service	Excluded	Questionnaire		
Clients of support workers	Increased confidence, more job ready, secure work experience and paid employment, skills development, (financial wellbeing?)	Excluded	NA		

Appendix 3: Service User Questionnaires and Telephone Interviews

Initial service user engagement was through a 'customer feedback' questionnaire which was sent out to the 53 clients who had used the Employment and Skills Service during the analysis period. This questionnaire (below) consisted of 12 questions focusing on the specific services being accessed by individuals, the quality of support being received, the outcomes being experienced and achieved and an indication of to what degree they valued the service.

Customer Feedback Form Questions

1. How did you get to know about Ashram's Employment and Skills services programme?

2. Which of these Employment and Skills services did you access?

Writing CV

Gaining access to paid/voluntary job opportunities

Practicing good interview techniques

Advice and support on enrolling for skills development courses

Advice and support on enhancing educational qualification

Advice and support on starting own business

Other

Additional Comments:

3. For the services accessed, how do you rate the quality of support received?

Excellent

Good

Average

Poor

Additional Comments

4. Why did you decide to access the above services through Ashram and how do you find these services different from that provided by other agencies?

5. How would you rate the Employment and Skills Coach's professionalism and attitude?

Excellent

Good

Average

Poor

Additional Comments

6. How do you rate the overall support received from the Employment and Skills Coach?

Excellent

Good

Average

Poor

Additional Comments

7. Which of the following outcomes have you achieved after accessing Ashram's Employment and Skills Service?
Paid Employment
Informal / formal training
Opportunity to further educational qualification
Employment experience through voluntary work

Additional Comments
8. If you have completed Informal/formal training, gained a formal qualification or gained employment experience through voluntary work, what do you plan to do next?
9. What difference has the Employment and Skills Service made to you? Can you explain the changes you have experienced as a result of accessing the Service?
10. In relation to your answer above and the difference the Service has made to you, how would you value Ashram's Employment and Skills Service (rating between 1 – 10)?
11. Are there any other services / areas of support that you would like to see offered through the Employment and Skills Service?
12. Are you satisfied with the overall support and the outcomes you have achieved?

Telephone interviews

Five telephone interviews with service users were conducted in February 2012. The initial intention was to increase the number of questionnaire responses received through more informal conversations. However the telephone interviews provided the opportunity for an objective individual to explore in more depth the service users views of the service focusing in particular on the ways that they felt the service was making a difference to them and how much value they as individuals placed on the service.

The customer feedback questionnaire above was used as the basis for the telephone interviews. These interviews were more in depth (generally lasting between 10 – 15 minutes). The interviewer used open-ended questions where possible and encouraged the interviewee to speak in greater detail and elaborate on their answers.

Each telephone interview was written up and the information gathered was used to inform the development of the impact map.

Service User Questionnaire

The questionnaire below was completed by the eight participants who attended the service user workshops. None of the eight participants had previously completed or been interviewed with regards to the Customer Feedback Form. The workshop format provided the opportunity to explore in more detail with participants the open-ended questions around the value of the service and the difference it made to individuals as opposed to gathering this information from the questionnaire alone. This allowed the focus of the questionnaire to be slightly different – more around the type of support being accessed and individuals' hopes and aspirations for the future.

This questionnaire relates to the support that you have received through the employability support service provided by Zoe Jubert at Ashram

Please read through the questionnaire and ensure you understand the questions. If not, ask the person who is giving you this questionnaire.

<p>1. Had you received any support, advice, guidance or training from another agency, prior to the help from Zoe? Yes No (please circle)</p> <p>If Yes, please tell us the name of the organisation : What kind of help or training did they give you?</p> <p>How long did you receive this?</p> <p>Did this stop when you started to get help from Zoe? Yes No (please circle)</p>
<p>2. Please tell us how you accessed help from Zoe. (this could include : word of mouth, leaflet, referral from someone receiving help, referral at sign up or at an event..... or some other way.... Tell us)</p>
<p>3. What kind of help did you get/are you getting from Zoe? (this could include : help with CV, volunteering, signposting to a college, training for a specific skillor more.... Tell us)</p>
<p>4. What did you hope to get from this support? (this could include : a job, help getting an interview, a new skill, updating a skill, getting some work experience or more.... Tell us)</p>
<p>5. Did you hope that this would help you get into a specific area of work (retail, office, engineering, baking etc) or a specific job (secretary, engineer, teaching assistant, cook)?</p> <p>Yes No (please circle)</p> <p>If yes, what work or job? (please tell us what)</p>
<p>6. Did you hope that this would help you get into more training or a college course? Yes No (please circle)</p> <p>If yes, what type of course? (please tell us)</p>
<p>7. Did you know what skills, training or experience you needed to get into this type of work or job? Yes No (please circle)</p> <p>Are you clearer now what skills, training, experience are needed to get into this type</p>

of work or job ? **Yes No** (*please circle*)

8. Are you doing the kind of work or training that you hoped the support would help you get into? **Yes No** (*please circle*)

If No, why do you think this is? (*this could include : there are no jobs like this at the moment, I need more skills/qualifications, I cannot work at the moment Please tell us*)

Is this still what you would hope to do in the future ? **Yes or No**

9. Are there any personal circumstances which you feel limit or stop you getting the work or training that you would like to get into? **Yes No** (*please circle*)

If yes, could you tell us about what this is this ?
(*this could include caring responsibilities, lack of childcare, qualifications, problems reading, a disability, the cost of training Please tell us....*)

Appendix 4: Summary of Stakeholder Involvement: tenant workshops and landlord key questions

Tenant workshops

As part of our stakeholder involvement we ran two specific workshops for users of the Employment and Skills Service.

We had five participants at the first of these workshops, and three at the second. We had hoped to have more participants and if we were repeating this exercise we would have had longer lead in times to enable more people to attend.

However through the workshops we gathered a great deal of information for our SROI analysis. We were able to check and refine the information contained in our impact map (inputs, outputs and outcomes) and we gained valuable information which informed our impact and in particular attribution calculations.

The workshops were designed in conjunction with the Planning for Real Unit, part of the Accord Group. Planning for Real has a reputation for using visual and participative techniques and they have a wide range of resources that lend themselves to interactive stakeholder workshops.

Each workshop lasted for around two and a half hours and included a range of exercises. Informal discussions where participants talked about their experiences and their individual journeys since coming into contact with the Employment and Skills Service generated a wealth of information and were the basis for the case studies contained in the Outcomes section of this report. Participants did a 'rainbow of gold' exercise where they each charted their journey in terms of where they had come from and where they are now since receiving support from the Employment and Skills Service. This was useful in verifying the outcomes contained in our impact map, particularly around increased self confidence and changes in aspirations for improving lives. Participants also did a 'brick wall' exercise where we gathered their views on the other stakeholders who are providing support in their progress towards employment (e.g. family and friends support workers, JCP, Children's Centre). We asked participants to describe the make up of support and the balance in terms of who was providing the most significant contribution.

The design and delivery of these workshops will provide a useful foundation for the stakeholder involvement in future SROI projects. For future workshops, there would be elements that we would want to refine in order to gather and verify as much information as possible in the most efficient and interactive way. For example we could develop a more robust exercise for informing our impact calculations. Having been through this SROI analysis we are also certain of the necessity of involving stakeholders on separate occasions for different stages of the process, most notably in terms of the collection of outcomes data taking place at a different time to the engagement around the developing of the impact map and the describing of outcomes and outcome indicators.

Landlord Questionnaire

A simple questionnaire was designed by the team and completed by the Director for Ashram, CEO of Ashram and one of Ashram's housing officers. The purpose was to understand why Ashram had taken the decision to invest in a service of this nature and how this aligned with their core business objectives. This helped us to comprehend the business case and to ascertain whether this investment decision was more about securing a financial return for Ashram, or motivated by a stronger social and moral imperative, where employment and skills support was seen as a good thing to offer residents.

As a social housing provider undergoing its own transformative journey, it was also important to understand how this service might help in positioning Ashram as a leading civic agency for Birmingham.

This questionnaire was also supplemented by further face-to-face dialogue with the Director and other frontline housing staff and representatives from across the wider Accord Group to fully map outcomes including future aspirations for the service.

Appendix 5: Employment Service Workshop

Step 1: Introduction – 15 minutes

“We are reviewing the employability project and speaking with different stakeholders to ask them about their experiences. We are interested in trying to work out what sort of value and importance you place on the different aspects of this service so that we can improve what we are doing for you. It will take approximately 2-2½ hours.”

Throughout the workshop we will be doing:

- Introductions (15 minutes)
- Building a map of project stakeholders (15 minutes)
- Creating / verifying impact map (60 minutes)
- Sharing experiences (15 mins)
- Talking about other projects and activities in the area (15 minutes)
- Putting a value on project outcomes (30 minutes)

Introductions

- Ask participants to introduce themselves and say where they are from.
- Ask how many people know about the project and what it is trying to do.
- Explain that the session is an interactive one and will require their participation.

Step 2: Building the stakeholder map – 15 minutes

“We want to start by looking at the people who have had an affect on you looking for work (i.e. by providing services, help or support) and the people who will be affected by you finding work (i.e. anyone who benefits from you being in employment). We refer to these as the stakeholders”

- On bricks ask participants to list the different stakeholder groups for the project. Use Blue bricks for the ones who have had an effect and Green bricks for the ones affected.
- Get them to start putting bricks in the wall.
- Maybe break here for a cuppa
- During the tea break, start compiling a list of the stakeholders.
- Once you have a list ask what each stakeholder involvement is with the project, such as: Are they providing services, help or support? Are they working on the project? Are they beneficiaries of the project? Try to get a consensus score for the degree of affect (1-Low to 10-High). Use Concentric Circle chart.

Step 3: impact map– 40 minutes

This step deals with project outcomes as experienced by the stakeholders.

- Explain to the group that: *“We have talked about the project activities and how you have been involved, now we are going to look at what these activities have resulted in. In other words, what changes are you – or others that you know – experiencing because of these activities?”*
- Use CE’s questionnaire as the basis for this. (adapted to fit in with the Who? What? Why?)
- Pair off group and ask participants to spend 5mins talking to their partner about their responses – what answers did they feel were the most significant in terms of the changes to them.
- Ask participants to shout out in the plenary some key changes they, or their partner have experienced – these can be positive or negative.
- Prompt any further answers about change in behaviour or attitude by asking: *“Who? What? Why? What are you doing differently? What are others doing differently? How are the project’s activities leading to these changes or ‘outcomes’.”*
- You should write down each point on a card or post-it note.
- You can ask: *“Can you see any problems or barriers preventing these project activities or changes happening?”* Note these separately.

COFFEE BREAK

Step 4: Drawing the impact map– 15 minutes

Put the following headings on the wall – you can then place the information you have gathered above on cards under each of these headings. Explain the logical link between inputs - activity – output – outcome.

- Inputs: Time, grants, staff, volunteers
- Activities: Project activities
- Outputs: Experienced by participants and other stakeholders
- Outcomes: Changes experienced/ observed by participants
- Impacts: Big picture changes for a wider group of people

Step 5: Estimating Deadweight and Attribution – 15 minutes

Ask “*What other activities or projects are going on that might influence outcomes?*” If there are other projects try to get a feel for how important the project has been in delivering the change. Use the following parameters:

- Very High: Contributing 80%-100% of the change
- High: Contributing 40%-79% of the change
- Limited: Contributing 20%-39% of the change
- Low: Contributing 0%-19% of the change

Ask “*What would have happened if the project did not exist? Would any of the changes have happened anyway? Why? “What does this change allow you to do that you couldn’t do before?”*”

Step 6: Closure

Thank everyone for participating. Explain how we now have to calculate the value of the outcomes to give us an understanding of the wider impact that the project has had. This will be followed up by feedback on the final report later in the year.

Appendix 6: Glossary²⁹

Attribution	An assessment of how much of the outcome was caused by the contribution of other organisations or people.
Cost allocation	The allocation of costs or expenditure to activities related to a given programme, product or business.
Deadweight	A measure of the amount of outcome that would have happened even if the activity had not taken place.
Discounting	The process by which future financial costs and benefits are recalculated to present-day values.
Discount rate	The interest rate used to discount future costs and benefits to a present value.
Displacement	An assessment of how much of the outcome has displaced other outcomes.
Distance travelled	The progress that a beneficiary makes towards an outcome (also called 'intermediate outcomes').
Drop-off	The deterioration of an outcome over time.
Duration	How long (usually in years) an outcome lasts after the intervention, such as length of time a participant remains in a new job.
Financial value	The financial surplus generated by an organisation in the course of its activities.
Financial model	A set of relationships between financial variables that allow the effect of changes to variables to be tested.
Impact	The difference between the outcome for participants, taking into account what would have happened anyway, the contribution of others and the length of time the outcomes last.
Impact map	A table that captures how an activity makes a difference: that is, how it uses its resources to provide activities that then lead to particular outcomes for different stakeholders.
Income	An organisation's financial income from sales, donations, contracts or grants.
Inputs	The contributions made by each stakeholder that are necessary for the activity to happen.
Materiality	Information is material if its omission has the potential to affect the readers' or stakeholders' decisions.
Monetise	To assign a financial value to something.
Net present value	The value in today's currency of money that is expected in the future minus the investment required to generate the activity
Net social return ratio	Net present value of the impact divided by total investment.
Outcome	The changes resulting from an activity. The main types of change from the perspective of stakeholders are unintended (unexpected) and intended (expected), positive and negative change.
Outputs	A way of describing the activity in relation to each stakeholder's inputs in quantitative terms.
Outcome indicator	Well-defined measure of an outcome.
Payback period	Time in months or years for the value of the impact to exceed the investment.
Proxy	An approximation of value where an exact measure is impossible to obtain.
Scope	The activities, timescale, boundaries and type of SROI analysis.
Sensitivity analysis	Process by which the sensitivity of an SROI model to changes in different variables is assessed.
Social return ratio	Total present value of the impact divided by total investment.
Stakeholders	People, organisations or entities that experience change, whether positive or negative, as a result of the activity that is being analysed.

²⁹ Glossary reproduced from 'A guide to SROI' – The SROI Network (2012) p85