

Gauge NI – SROI Report

CARE & REPAIR PROGRAMME- IRISH LIFE/AGE ACTION

EXECUTIVE SUMMARY

This report analyses the Social Return on Investment for the Care and Repair programme, funded by Irish Life and managed by Age Action. Social Return on Investment, based on the principles of cost benefit analysis is a framework for measuring and accounting for value. This report includes an evaluative social return on investment analysis, looking back historically at real data over the past three years 2009-2011 and two years forecast.

The Care and Repair Programme, established in 2006, was co-created by two likeminded organisations, Irish Life and Age Action. Irish Life determined that as an organisation they strived to provide true corporate social responsibility to an audience reflective of their customers, older people. Irish Life felt that partnering with an organisation already established within the voluntary sector as a well known brand would not only provide credibility but also pre-established infrastructure allowing the CSR investment to go directly towards the service provision. Irish Life determined that it wanted to make a true CSR investment and entered the partnership without an ulterior motive- they were not interested in just writing a cheque but establishing a well reputable service making a significant difference in the lives of older people.

After reviewing the organisational landscape with support from Business in the Community, Age Action was identified as the most appropriate partner. Once approached, the two organisations determined that it was a mutually beneficial programme and started down the path of creating this new initiative. Together the two organisations worked hand in hand to establish Care and Repair in Ireland. Irish Life funded the programme and Age Action was responsible for the execution of the programme. The Care and Repair model is flexible and a number of different organisational sets up are utilised which are reviewed in the appendix. The majority of the models rely on the use of volunteers to provide the services.

The programme started out as a direct service model with Age Action managing and delivering the entire programme. The programme involves providing older people with care in the form of a visit or repair, with two volunteers going out to complete minor odd jobs that do not take more than an hour. They do not complete jobs that require a professional tradesperson. For that, Age Action would make a trade referral to a preferred supplier who is tried and tested taking away the stress of hiring an unreliable tradesperson.

In order to increase the outreach of the programme it was determined that a franchise partner model would be utilised to enhance roll out the programme throughout Ireland. Each franchise model varies depending on the needs of the community and the management of those community organisations involved with the programme. There are currently over 20 franchise partners within 13 counties throughout Ireland running the Care and Repair

programme. Age Action now delivers 50% of the programme and franchise partners deliver 50%.

The franchise partner model has become extremely effective as it taps into the previously established infrastructure of communities. Often organisations will parachute services in and then when funding becomes decreased those services are pulled out. Age Action works collaboratively with the franchise partners to ensure that the programmes they establish are embedded within the community development infrastructure therefore ensuring a higher success rate and increased likelihood of sustainability. The franchise model has provided best practice in terms of establishing the Care and Repair service at a local level. The Age Action National Development team facilitates and manages the support to establish new franchise partners. They also share best practice and learnings from previous set ups. The franchise partners avail of support from the National Development Manager and team as necessary. Age Action facilitates all the training of the volunteers and workers within the Care and Repair programme. The franchise partnership allows for the programme to have flexibility to ensure that it is meeting the needs of the local people in way that works best for them. This is one of the features that not only makes this programme unique but allow it to be customised based on needs and support of the local community.

One of the unintentional benefits for Age Action has been that Care and Repair has provided a mechanism for raising the profile of the organisation at a grassroots level. Age Actions' audience often are isolated within their own homes and the Care and Repair programme has provided outreach into the homes of their target audience. This in turn has supported Age Action's donation drive with an increase in giving and has acted as a marketing initiative.

Irish Life should be commended on the purist attitude towards altruistic CSR and the legacy of creating such a successful programme that embodies a "true" partnership with Age Action. According to McWilliams and Siegel (2001), true CSR is defined as situations where firms goes beyond compliance and engages in "actions that appear to further some social good, beyond the interests of the firm".¹ They do not only donate the money to the Care and Repair programme but they also act as an advisor, sharing best practice from the private sector. Irish Life works hand in hand with Age Action to continually improve and evolve the programme in order to increase sustainability, longevity, outreach and the overall quality of the programme. This partnership between the private and voluntary sector allows both learning from each other and lessons from the different business environments in order to better the Care and Repair programme.

¹ McWilliams, A. and Siegel, D (2001). 'Corporate social responsibility: a theory of the firm perspective'. *Academy of Management Review*, **26**, 117-27

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“This programme enables older people to remain in their homes, increasing comfort and security. The beauty of this programme is that we providing a caring service that addresses immediate needs.”

- Fran Flood- National Development Manager for Care and Repair Programme.

“Small things can sometimes cause a lot of annoyance. Care and Repair are so very useful. They are the best thing to happen in our area- everyone is happy with the service. They provide a reliable service that offers immediate help, which is much appreciated”.

- Care and Repair client.

“A really worthwhile service especially for people with very little social contact”

- Care and Repair volunteer

“Hard to get people to do jobs- especially someone you trust. The person that comes out from Care and Repair is friendly and easy to talk to- they are someone I can depend and they always phone back.”

- Care and Repair client

“The reaction we get from the people makes a big difference as they are so delighted to see someone coming. It is an amazing that our help makes a massive impact”

- Care and Repair volunteer

“This programme provides invaluable support to older people who have no access to any type of similar service. It also makes an amazing impact to the volunteers who are involved”

- Franchise Partner

The Care and Repair key stated outcomes for its delivery are:

- Increase access to services for the elderly that provides comfort and security
- Decrease isolation for elderly and support elderly within their own homes

- Building capacity of volunteers some of which are older people
- Empower community organisations to add Care and Repair services to older people in their local area through franchise partnership

Irish Life’s (funder) stated aspirations for the programme are:

- To give something back to the communities where it does business
- To create a sustainable new community programme with measurable impacts in the community
- To support older people in the community

The total social return on the investment ratio for the Care and Repair Programme is €16.85 meaning that for every €1 invested by Irish Life through their partnership with Age Action Ireland returns €16.85. Through an investment* of €700,000, Irish Life’s corporate responsibility has generated €11,795,000 over a five-year period from 1st January 2009 to 31st December 2013. This is a significant return, not least in the current economic climate in Ireland and indeed further afield. The social value this investment and indeed partnership has levered across Ireland is borne out through this study. Through testaments of the key stakeholders across the programme and the outcomes and impact, Age Action and its franchise partners are affecting the length and breadth of Ireland. It is somewhat refreshing and reassuring to see that Ireland’s social fabric, cohesion and inclusion is alive and well. Irish Life cares and Age Action repairs not just homes but lives, knitted together in a perfect partnership. Perhaps, this is the key lesson – true corporate responsibility in action can make a difference and evidence its impact with charities and communities alike across Ireland.

* Overall, the total investment by Irish Life was €1,200,000 from inception of the programme in 2005 until December 2011. However, the initial two years have been excluded from study period as these were for initial inception and set-up costs of the Care and Repair Programme.

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1. BRIEF ORGANISATIONAL INFORMATION

As the Care and Repair programme is a joint initiative, information on both partnership organisations, Irish Life and Age Action is included below. More thorough information is included on each organisation in appendix 20.1 and 20.2.

Irish Life Retail

Irish Life Retail is part of the Irish Life & Permanent group of companies. Founded in 1939, Irish Life has been taking care of its customers' financial future for 70 years and is the market leader in provision of life, pension and investment products.

Irish Life Retail uses a variety of distribution channels including a network of supporting independent intermediaries, a direct sales force and franchisees. In addition Irish Life Retail's products are provided on a wholesale basis into the branch network of a number of other financial institutions. Irish Life Retail employs almost 900 people and has more than 750,000 customers in Ireland.

Age Action

Age Action, established in 1992, is a charity which promotes positive ageing and better policies and services for older people. Working with, and on behalf of, older people Age Action aims to make Ireland the best place in the world in which to grow older.

2. CARE AND REPAIR PROGRAMME HISTORY

In 2006, Irish Life increased significantly its funding for Corporate Social Responsibility and selected Age Action as one of its major community partners to develop Care & Repair services for older people in Ireland. The concept of Care and Repair is to provide older people with services within their home including visits, minor repairs and trade referrals. The idea for Care & Repair had come from a similar programme running in Edinburgh. Representatives of Irish Life and Age Action met with the administrators of the programme in Edinburgh who were happy to share their knowledge and experience. This gave Age Action a good start in launching a similar programme in Ireland.

The programme was formally launched in October 2007 following a six-month pilot study of the services in Dublin and Galway. It received early independent recognition of its social value by winning the Community Development category in the 2007 Living Dublin Awards.

It became clear at an early stage that in order to expand the programme nationally within a reasonable timeframe,

the best approach would be to invite individuals and groups to run the services on a franchise basis with support and guidance from Age Action. The service model has now evolved as one where approximately 50% of the services are provided by Age Action directly and the other 50% through franchise groups – there were 17 of these in place at the end of 2011.

Irish Life's aspirations in funding the Care & Repair programme were:

- to give something back to the communities where it does business
- to create a sustainable new community programme with measurable impacts in the community
- to support older people in the community

The partnership approach offers numerous benefits:

- efficiency: by directing funding into existing community organisation, the proportion of funding absorbed by overheads is minimised
- sharing of expertise: commercial and community organisations have different experience, perspectives and skill sets and by combining these therefore increases the chances of success
- reputational benefits: by choosing to enter a community partnership, a commercial and a charity organisation are committing to work together to deliver a social benefit. In the process both can benefit reputations
- credibility and buy in: by working with an organisation that is well established within the target group allows for buy in and increases uptake of participation in the programme

Irish Life was interested in a service which would help support older people in their own homes. . In recent years there has been a growing tendency for older people to live apart from their children or other relatives and have less support.² At the initial phase of the programme, it was determined to research what established services for older people were available in other markets and to consider if there was a service to emulate. After reviewing current programmes available in other parts of the UK they became aware of a programme that provided handy work and support to the elderly in Edinburgh, called Care and Repair. Gerry Loughrey from Irish Life and three people from Age Action went over to Edinburgh to gain a better understanding of the programme. After further discussion with the provider in Edinburgh the Care and Repair model was chosen.

² Age Action Aging Fact Sheet
<http://www.ageaction.ie/sites/default/files/pdf/Age%20Action%27s%20Age%20Fact%20Sheet%20-%20compiled%20April%202011%20Final%20version.pdf>

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It was agreed that Age Action would set up and manage the Care and Repair programme in Ireland with Irish Life funding it. Initially a pilot was managed in Dublin in 2007. Then in 2008 on a recommendation from Irish Life a franchise model was formulated in order to increase service provision throughout Ireland. From three years ago the programme has grown from strength to strength and now includes over 20 franchise partners throughout over 13 counties including Cork, Dublin, Galway, Kildare, Laois, Limerick, Longfod, Louth, Mayo, Roscommon, Waterford, Westmeath, and Wicklow. In 2011 alone, Care and Repair provided over 13,000 repairs and home visits throughout Ireland.

3. WHAT THE REPORT MEASURES

The Report's Purpose

The purpose of the SROI report is to help Age Action and Irish Life to gain an understanding of the social value being generated by the Care and Repair Programme. The Care and Repair programme not only benefits the end user- the clients but also the volunteers, the tradesmen, and the community in general involved with the initiative. The impact of the Care and Repair programme should not be underestimated as according to the clients and volunteers, this initiative can make the difference between life and death. A phone call to someone who is psychologically having a rough day or installing a smoke detector is a life line and potentially can save a life. This programme provides services to some of the most vulnerable in society and allows the elderly to be supported in the comfort of their own home which is where most of them would like to stay as long as possible. The impact of this programme is not be underestimated - while to some these jobs might be considered minor but to the clients some of these jobs are life changing such as installing a smoke detector or lock on the door.

The Report's Scope

- To analyse the Social Return on Investment of the Care and Repair programme
- The scope has been agreed by consultation with Age Action, Irish Life and Gauge to include three years evaluative- 2009, 2010, 2011 and two years forecast. Retrospective in approach, this study covers the following time periods - January-December 2009, January-December 2010, and January-December 2011 with results extrapolated and forecasted over a two-year period (January 2012- December 2013).
- The following three services will be the main focus of the study:

- **Minor Repair** – carry out small repairs or minor home tasks for older people
 - **Home Visits**- social contact to older people who are at risk of isolation in their homes
 - **Trades Referrals**- referrals are made to pre-approved reliable tradesmen
- This study focused on 7 Care and Repair programmes spread across Ireland based across a representative portion managed by Age Action (three including Galway, Dublin and Cork) and Franchise Partners (four including Limerick, Mayo, Drogheda, and Galway) utilising different implementation models (these we will be discussed in detail further within this report).

4. CARE AND REPAIR PROGRAMME

The Age Action Care and Repair Programme works to improve the quality of life of all older people and their carers - especially those who are most disadvantaged and vulnerable - by enabling them to live full, independent and satisfying lives for as long as they wish in their own homes.

Age Action sees the Care and Repair Programme as an innovative opportunity to create new services of value to older people in Ireland and to help Age Action fulfill its core goal of making Ireland the best country in the world in which to grow older.

The vision of the Age Action Care and Repair Programme is to enable older and vulnerable people to remain in their own homes, in their own communities, living as independently as possible, through the improvement of their housing conditions and their level of comfort and security.

Age Action continues to develop the Care and Repair Services outreach for older people in Ireland. The programme is currently available through Age Action direct services in Dublin, Cork and Galway City. After the inclusion of the franchise partner model now more than twenty local community groups (or Franchise Partners) also deliver the service with the support of Age Action throughout the country.

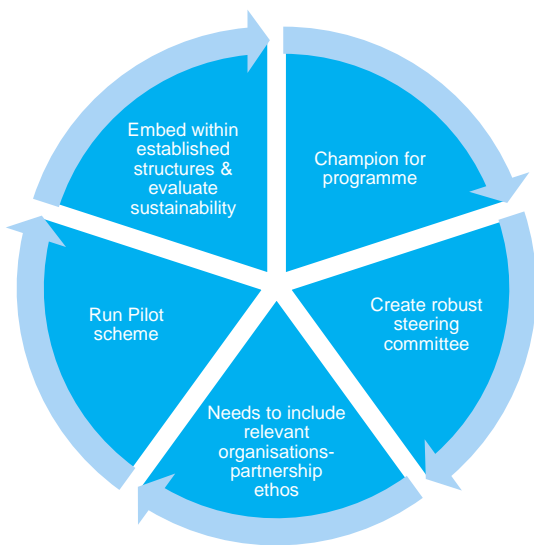
The strength of the franchise model is that Age Action is instrumental in creating the franchises. The National Development Manager evaluates the strength of the model proposed by the potential franchise partner and based on expertise gained from prior experience develops a model

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which will provide the most sustainability. Please see below for the key elements of a successful franchise. One of the main roles of the National Development Manager is to work alongside potential franchise partners to ensure successful creation of additional franchises.

The first stage of developing a franchise is a rigorous risk assessment to determine if there are proper infrastructure and support structures to promote sustainability. Age Action has a wealth of experience in understanding what needs to be in place in order to create a successful franchise. This takes up considerable time of the National Development Director but there is a direct correlation with a strict assessment in place and the likelihood of a successful franchise. Once the risk assessment is completed, the franchise partner can continue in the process of becoming an established franchise. In establishing a franchise there are core components that are required. They include the following:



It is necessary for the franchise partner to embed within the local community structures and within organisations already established. This will allow for the franchise partner to leverage work to date within the community and build on the contacts already established. Whilst there needs to be a champion for the programme- one person alone is unable to manage the entire programme. A subcommittee of interested parties or a subcommittee of one organisation must work collaboratively together, in order to create a steering committee. It is necessary to have proper insurance and quality assurance (checks and balances) in place so all the work that is involved during the start up is protected. There is also an element of tailoring the programme to suit the local needs. For example in one franchise partner sub group they were already completing odd jobs by a handy man but they

wanted to evolve the service to include greater outreach and more volunteers thereby increasing the capacity of the programme. The service needs to not compete with what is currently already available but enhance and expand the offerings. Another important element is to start small and grow. It is imperative that a pilot scheme is utilised to tweak out any problems or issues. The relationship between the franchise partner and Age Action is cemented with a formal franchise agreement.

Age Action provides a fully comprehensive operations manual which lays out clearly the necessary steps and guidelines for the programme along with regulations and requirements. This safeguards the volunteers and workers whilst also ensuring a standard level of service that is aligned with the Age Action direct delivery model. This way, participants throughout Ireland will have a similar experience and a high level of service. With Age Action supporting the franchise partners it provides the credibility for organisations and allows for them to be supported by a large well known organisation. People are more open to accepting services if they have the Age Action affiliation.

The Age Action National Development Manager provides the initial start up consultation and development support, on-going guidance, training for volunteers and employees along with any other necessary requests. Irish Life has supported group wide sharing of information by sponsoring Care and Repair conferences where the coordinators of the different programmes have convened to discuss best practice and share areas for growth and development. These days also have proved to provide support to those franchise partners and coordinators to continue growing the programme and making improvements.

Care and Repair participants are aged over 65 years. Small minor repairs include jobs that range from replacing light bulbs to fitting door chains and spy-holes or smoke alarms, putting up shelves, moving light pieces of furniture across the room, and taking down, putting up curtains. The volunteers and staff provide a willing pair of helping hands to do a variety of small tasks that an older person may find difficult to do. A "job" is expected to not take longer than an hour, though many small tasks may be completed during the same visit. The service is free of charge; the client only pays for cost of materials used for the job. Donations are always welcome. The services that Age Action completes do not compete with professional trades people. If the job requires a professional trades person, Age Action makes a referral to a reliable trades person on their list of preferred suppliers.

Please see the descriptions of the five main Care and Repair services below:

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1. **The Repair Service** uses a pool of volunteers and handypersons to carry out small repairs and to complete minor home tasks for older people. The most common services required by older people are:

- Minor gardening (e.g. mowing lawns)
- Minor painting (e.g. front door, garden gate)
- Changing plugs, fuses and light bulbs
- Hanging curtains
- Installing security locks and chains
- Installing domestic smoke alarms

The above is not an exhaustive list. Care and Repair prides itself on doing whatever jobs needs to be done within each projects' parameters. An example that highlights the fact that Care and Repair do most odd jobs involved a woman whose car batter was dead. A Care and Repair volunteer helped her out by jump starting her car. Her husband suffers from Alzheimer's and let the car battery go dead by mistake. She did not know who to turn to for help and Care and Repair were there for her providing such an invaluable service. Other examples are too numerous to list but needless to say Care and Repair go above and beyond helping people out with whatever odd job needs to be completed. If they are unable to complete it they refer the person to an appropriate tradesperson.

2. **The Care Service** is a home visiting or befriending service using volunteers to provide social contact to older people who are at risk of isolation in their own homes.

3. **The Trades Referral Service** is an option whereby a register of reliable and honest tradespersons is maintained. Through this means, informed recommendations can be made to older people who may have job requirements which are beyond the scope of the Care and Repair Programme. In this way, clients can have confidence that the prices charged for these larger jobs by professional trades people will be reasonable and that the service provided will be of a good standard. In ensure there is integrity in appointing the tradespeople, Age Action work with a credible association, National Guilds of Master Craftsmen.

4. **The Quote Check Services** a service whereby an experienced volunteer visits the older person's home, assesses a large job and gives an informed opinion about quotations received by the client from professional tradespersons. Quote Check gives the older person peace of mind and the assurance that the prices being quoted do not constitute a "rip off".

5. **Friendly Call or Daily Contact Service** is a daily phone call made to the client at a pre-arranged time by a

volunteer. The purpose of the call is to make sure that the client is in good spirits and not in need of urgent support (especially medical attention).

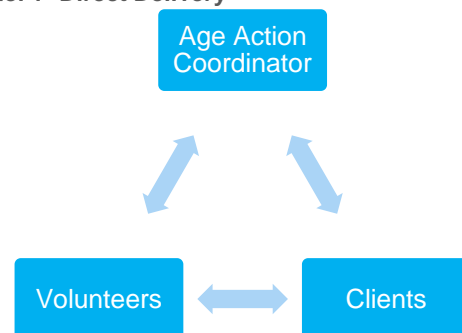
There are two distinct types of programme delivery-

- 1.) Direct Programme Delivery in which the programme is delivered and managed by Age Action Ireland
- 2.) Franchise Partner Model in which the programme is franchised from Age Action Ireland. Age Action provides a fully comprehensive Operations Manual to provide the franchise partner with all the guidelines and procedures necessary. Age Action also provides standard materials for a franchise including training, documentation and provides training for volunteers. Age Action allows for flexibility of the programme but ensures that standard protocols are followed so that the ethos and services are aligned, in order to ensure a high quality service.

Direct Programme Delivery Models

There are a number of different models within the Direct Programme Delivery.

Model 1- Direct Delivery



In the model above clients phone a local number or free-phone number to access the services from a centralised location. Typically the administrator is an employee of Age Action. He/She evaluates the need of the client and then coordinates a volunteer to contact the client to organise a mutually convenient date and time for the work to be done.

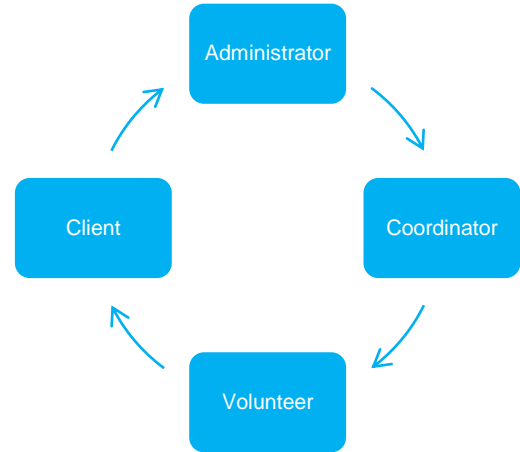
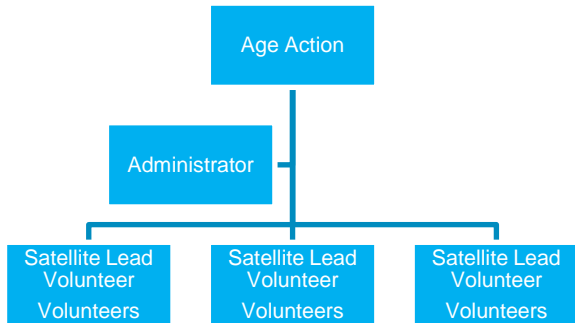
Model 2- Direct Delivery

In this model the administrator is responsible for fielding work received by the clients to volunteers in specific cells in specific areas. In each satellite cell there is a lead volunteer who takes responsibility for accepting the jobs and passing them onto the most appropriate volunteer who has the skills needed to complete the job.

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This method minimises transport costs and in many instances the volunteers and clients know each other which instantly creates a trustful relationship.

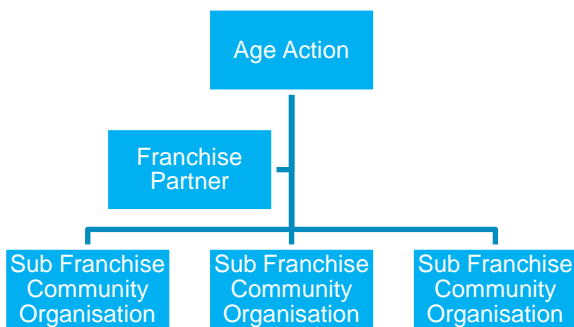


Franchise Partner Models

Within the Franchise partner model there is flexibility so that the model can be adjusted to work within the current community infrastructure tailored to local needs. Please see below for some examples of the models.

Model 1- Franchise Partner

In model one there is a main franchise partner with sub-franchises which are community organizations that are already established in the different community areas. The sub-franchises rely on the coordinator of the Care and Repair programme in order to recruit volunteers and provide on-going support.

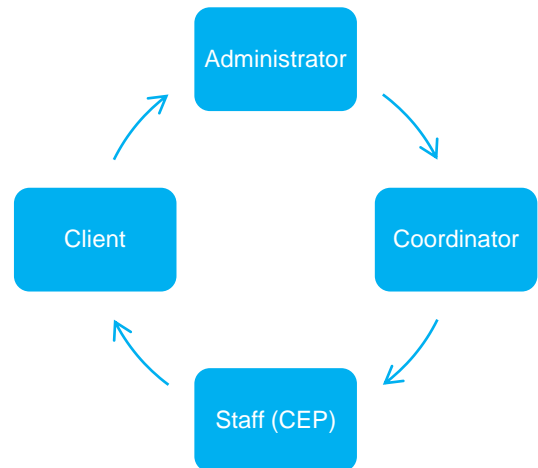


Model 2- Franchise Partner

Within this model only the repair service is included and is run by volunteers only. One volunteer works as the administrator accepting and logging the calls while another volunteer acts as the coordinator. The coordinator assesses the jobs and coordinates with other volunteers who will go out and complete the job.

Model 3- Franchise Partner

A third model shows that the franchise is run by an administrator and coordinator who are both paid by the organisation for which he/she works. Instead of having volunteers carry out the repairs or caring work, Staff (CEP) are employed to work so many hours per week. The Community Employment (CE) programme is designed to help people who are long-term unemployed and other disadvantaged people to get back to work by offering part-time and temporary placements in jobs based within local communities.³



3

[www.citizensinformation.ie/en/employment/unemployment and redundancy/employment support schemes/community_employment_scheme.htm](http://www.citizensinformation.ie/en/employment/unemployment_and_redundancy/employment_support_schemes/community_employment_scheme.htm)

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The models above only reflect a few of the common models. The models can be varied depending on the needs of the local area and the services which they feel are most relevant will be included. Within all the models of the Care and Repair programme, it is time intensive with logging the calls, assessing the job and coordinating the volunteers. It is essential that not a single call is missed or unlogged as that might leave people sitting at home waiting for service.

It is company policy for two people to visit a home at one time to ensure safety for the volunteers and safety for the older person. This is protocol that Age Action encourages to not only protect both parties but it also allows one person to provide care to the older person as well. It makes it more natural to have a conversation and less intrusive.

The sole funder of Care and Repair is Irish Life PLC. Whilst Age Action provides the start up and support function to the franchise partners. The franchise partners are responsible for obtaining their own programme funding.

Age Action is determined to expand its Care and Repair programme countrywide. They see the Care and Repair Programme as an innovative opportunity to create new services of added value to older and vulnerable people in Ireland and to help Age Action fulfill its core goal of making Ireland the best country in the world in which to grow older. The Programme additionally creates opportunities for Age Action to develop a network of strategic partnerships with a range of like-minded community bodies throughout the country.

Age Action's expansion strategy is to transfer the Care and Repair "know how" to appropriate local community groups or development partnerships as a "franchise". The franchise underlines Age Action's commitment to best practice and is communal in nature.

Age Action provides the franchise partners with a complete operations manual of how to manage and execute the Care and Repair programme inclusive of forms, processes, and necessary guidelines. They also provide support and on-going guidance as necessary.

Age Action desires to ensure that the Care and Repair Programme reaches the maximum number of older and vulnerable people possible and that it can be accessed in every county of Ireland. This programme makes a real difference to those older and vulnerable people involved as well as providing the volunteers and staff with a true sense of fulfillment. Age Action is determined to build on this outstanding achievement.

5. SROI

The following steps summarise the approach that was taken to completing this Report.

1. The scope, purpose and duration of the subject was agreed with Age Action
2. All stakeholders deemed to be material were identified by the Steering Group that was formed to guide the research process
3. Stakeholders were consulted to understand the change that each experienced whilst involved in the programme
4. The investment and outputs of Care and Repair were identified and mapped (in consultation with each stakeholder group)
5. Outcomes of the programme were determined along with the consultation with each stakeholder group and in communication with the Steering Group
6. Indicators and financial proxies (means of evidencing and assigning monetary value to outcomes) were assigned to each of the outcomes, again in consultation stakeholders
7. The SROI Ratio was calculated
8. The SROI Ratio was discounted to ensure the social value reflected all factors that influenced the outcomes
9. The SROI Report was drafted and finalised, incorporating feedback from Irish Life and Age Action. Revisions of the report were agreed with Irish Life and Age Action.

Fran Flood, the National Development Manager had recently established an advisory committee and it was suggested that they would be approached and asked to be the main participants in this SROI study. The advisory committee of the Care and Repair programmes represents programmes of a variety of models including both Age Action run and franchise partners managed programmes. The advisory committee includes the following:

- **Cork** – Age Action managed Programme (volunteer based)
- **Dublin**- Age Action managed Programme
- **Dublin**- Darndale Franchise Partner (Belcamp Village Centre)
- **Galway**- Age Action managed Programme
- **Galway**- Ballinasloe Franchise Partner (Social Services)
- **Limerick**- Franchise Partner (Paul Partnership)

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- **Louth-** Drogheda Franchise Partner (Senior Citizens Interest Group)
- **Mayo-** Claremorris Franchise Partner (Clar ICH Limited - Social Housing Association)

Further information on the SROI Methodology can be found in Appendix 20.5

6. STAKEHOLDERS

The following stakeholders were initially identified as being relevant to the Care & Repair Programme:

Stakeholder Groups
Participants
Volunteers
Tradesmen
Employees
Franchise Partners
HSE
Fire Authority/Garda
Age Action
Advisory Group- new group being put together to act in advisory capacity
Community organisations
Irish Life- funder

After consultation regarding materiality the following stakeholders were excluded from the report:

Advisory Group- as they were already included within the other groups
Employees
Community Organisations
Fire Authority/Garda

Full details of the materiality exercise can be found in Appendix 20.3

Stakeholder Groups Included in SROI Report
Participants (Clients)
Volunteers
Tradesmen
Franchise Partners
Age Action
HSE
Irish Life

7. DATA SOURCES & CONSULTATION

Following the SROI principles, the methods of data collection and stakeholder engagement divided itself into two broad areas, qualitative and quantitative. The consultation with the stakeholders determined the qualitative information, what actually changed for them, how the programme affects their lives, and the outcomes of this programme from their own perspective. Below details the extent of the stakeholder engagement carried out from which the outcome results were extrapolated. Stakeholders can be defined as any group or individual experiencing change as a direct result of the Care & Repair programme.

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Stakeholder Group	Consultation Method(s)	Total Number in Stakeholder Group	Number Questioned	Number of Responses
Participants	Telephone interviews	3,138 (TBC)	60	41
Volunteers	On-line questionnaires	320	42	26
	Interviews		12	8
Tradesmen	Telephone interviews	120	26	12
Franchise Partners	Telephone interviews	17	5	4
Age Action	Telephone interviews	12-15	4	4
HSE	Telephone interview	varies	3	3
Irish Life	Telephone interviews	1	1	1

8. OUTPUTS

The outputs of the programme are determined by the Age Action's monitoring information which collates the following totals, all of which relate to the main stakeholder only, that of the participant, on a yearly basis. It is important to note that some clients may avail of more than one of the services below numerous times throughout the year and therefore are considered repeat customers. In 2009 the only data captured was the number of jobs which was inclusive of home visits. The minor repairs and home visits were not differentiated.

Year	Number of Minor Repairs	Number of Home Visits
Jan-Dec 2009	7,770	960
Jan-Dec 2010	11,166	931
Jan-Dec 2011	12,953	368
3 Year Total	31,889	2,259

The franchise partner numbers fluctuate due to some being unable to sustain the funding and due to some unforeseen circumstances.

Year	Number of Franchise Partners	Number of Volunteers
Jan-Dec 2009	22	266
Jan-Dec 2010	28 mid yr- 19 at end of 2010	320
Jan-Dec 2011	19 mid year- 17 at end of 2011	297

9. STAKEHOLDER INPUTS & INVESTMENT

Stakeholder	Inputs	Investment Cost
Participants	Open their homes and let someone come in to help them	€0
Volunteers	Time, skills and commitment to support Care and Repair users	€0
Tradesmen	Willingness to do legitimate jobs for fair price	€0
Franchise Partners	Time and skill-funding from other sources	€0
Age Action	Time and expertise	€0
HSE	Unintended stakeholder	€0
Irish Life	****Funding over the 36-month study period	€700,000

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10. THEORY OF CHANGE

“The theory of change is an account of how the organisation takes in resources (inputs) to do its work (activities) which leads to direct results (outputs) and longer term or more significant results (outcomes), as well as the part of those outcomes the organisation can take credit for (impacts).”⁴

The presentation of any programme or organisation’s inputs, outputs and outcomes, illustrating the causal links between them, is referred to as an ‘impact map’. It helps an organisation to develop its theory of change by providing a framework for a better understanding of how its actions create and instigate change. The impact map was used throughout this report exercise but overall it is important to understand the main areas of change as a result of the programmes work. This lies in the stakeholder of the main participant.

Care and Repair volunteers and coordinators had some insight into the Care and Repair’s theory of change (i.e. how participants’ lives change as a result of the Programmes’ activities and how this change comes about).

This insight is summarised below:

For many older people it is difficult to deal with growing old and not being able to do odd jobs around the house. They may struggle with being vulnerable, living on their own, not going out or being susceptible to unreliable tradesmen ripping them off. So many times the clients and volunteers refer to the trust factor. Because the volunteers start to build a relationship with the clients there is a real trust between the two. This then grows into a friendship and it is more than just a “job” when the volunteer visits.

Even the tradesmen that take referrals are proud that they are providing a reliable service to elderly whilst maintaining a fair price. It is difficult to document the extent of the work that the Care and Repair programme does for clients and volunteers. This is a win win programme because a number of volunteers work with Care and Repair to give something back. The programme has positively affected the tradesmen and the volunteers as well in that a number of them have gone back to gain additional qualifications such as carpentry to be able to do tasks required from the old people, and a volunteer has gone on to complete the Care for the Older Person FETAC level 5 certificate. Whilst this programme appears to support the clients it is also important for the development of all those involved.

⁴ New Economics Foundation (nef) Measuring value: a guide to Social Return on Investment (SROI). 2nd Edition 2008

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Participant/Clients Before Participation in Care and Repair :	Participants/Clients After Involvement in Care and Repair:
<ul style="list-style-type: none">▪ Worried about completing tasks in the home▪ Concerned about independence▪ Lonely▪ Unsure of how to get jobs done in the house▪ Felt vulnerable to being ripped off by trades people▪ Isolated▪ May engage in dangerous activities such as climbing on a chair to do odd jobs	<ul style="list-style-type: none">▪ Increased independence▪ Less accidents due to feeling less stressed and not having to try to do tasks which require climbing on ladder or chair▪ Increased confidence▪ Increased well being▪ Less likely to be ripped off by unreliable trades people▪ Increased ability to live on own▪ A trustworthy support that they can rely on▪ Less likely to be targeted by criminal activity due to someone visiting regularly, grass being cut or people being around the house▪ Healthier due to less stress

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11. OUTCOMES

	Stakeholder	Outcome
1.1	Participants	Increase in ability to live on own-Less likely to need home help
1.2		Decrease in stress and anxiety leading to overall better mental health
1.3		Increase in friendships and feeling less isolated leading to overall better health
1.4		Feel more connected and supported- increase in confidence
1.5		Less accidents in the home due to home safety and less elderly trying to do jobs
2.1	Volunteers	Giving back to the community- increase in well being
2.2		Higher level of confidence as a result of more social engagement
2.3		Increase in development of skills through training and practicing skills
3.1	Tradesmen	Increase in workload due to referrals
3.2		Attending course or training
3.3		Giving back to community and helping older people provides increase in well being
4.1	Franchise Partner	Community organisations increase service provision through franchise
5.1	Age Action	Raising the profile of Age Action
6.1	HSE	Freeing up resources to attend to those more in need
7.1	Irish Life	Outcomes being met for all of the stakeholders above- true CSR

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Participants

The main delivery from the Care and Repair programme is that the elderly can be comfortable and secure in their own home. 100% of the participants interviewed felt that the Care and Repair programme positively impacted their own lives. To some this is a life line and takes away stress and pressure about getting small minor jobs done in the home.

Through the analysis of the outcome, the “so what” question was asked within the advisory committee and the following train of analysis was uncovered:

- Increase in self confidence
- Home safety
- More independence
- Making new friends
- More support in home
- Reduced social isolation
- Increased well being
- Less worry about being ripped off

84% of those interviewed felt this programme made quite a bit to a lot of difference to their lives. The positive comments are too long to list but needless to say this programme makes all the difference to some participants who are now living on their own with no family near them. Many of them would be lost without this programme.

95% stated that they have a greater ability to live on their own with the support of the Care and Repair programme. Many of those interviewed would rather go without than ask someone for help. This is quite dangerous because some of the work decreases accidents in the home which in turn can lead to broken hips, ill health and potentially a need to move into supported living. Placing locks in the house and installing smoke detectors can make a difference between life and death. It is a huge relief to the participants to have this support and know that it is a trustworthy, reliable service from those within their own community.

Volunteers

The introduction of a volunteer into an organisation has significant impact not only to the running of the programme. The Care and Repair programme could not run without the volunteers. They are pivotal in providing the services. The volunteers come from all different backgrounds and get involved with all different reasons. Some are having difficulty obtaining work and therefore want to be doing something to keep them busy. Others are retired and looking for something to keep them involved in their community. Others want to work with the elderly and become involved for altruistic reasons. It gets people who may be isolated themselves them out of the house and engaging in an activity that makes them feel good. The type of work they are doing is typically warmly received and very appreciated. This programme provides significant sense of good will to those that volunteer. 72% of volunteers interviewed felt that being involved in this programme has made a difference their day to day life.

89% of those interviewed reported that this programme increases their well being. This programme has a profound impact on the volunteers. To many of the volunteers this experience is making a difference in their own lives. They get even more out of it than they put in. For some this experience has encouraged them to go back to further education.

Tradesmen

It is important to note that the tradesmen whilst benefit financially from the programme typically become involved due to altruistic reasons. They want to help older people by providing a value for money service –they want them to have someone they can depend on, rely on and someone who will not rip them off. Some will do the job obtain payment and stay on for a cup of tea and visit- again this is time not on the clocks so they are not being paid for it. For some this has been the impetus to go back to further education.

Franchise Partners

Community development activities engage a community’s biggest latent resource – its residents. And by building the capacity of these volunteers, community development increases the effectiveness and scale of local people’s involvement in improving their communities. It is this capacity and the trusting, local level relationships that community development creates that will really deliver on the aspirations for a better society.

Successful community development is able to build an infrastructure of support and cooperation which allows for the resources to provide a community development intervention – primarily embodied in a community development worker – to be redeployed in response to the evolving needs of different localities. Care and Repair allows the franchise partners to create a programme that works best within their current infrastructure. This in turn allows them to provide additional service.

Age Action

Interestingly enough Age Action did not realise the impact the programme would have on reaching their target customers. This grassroots initiative has raised the profile of the organisation and provided them with outreach to some of the most isolated. This was better than any marketing campaign because it was viral and spread via word of mouth within communities. Older people were being told about the service and the programme from reliable sources that they trust and therefore increasing uptake of the programme. 95% of participants said this was their first experience of working with Age Action. Some knew it was an organisation that worked on behalf of older people but they were unaware of the services.

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For many the most common way to advertise the Care and Repair programme is by promoting at local churches, leaflet drop through doors within the community and putting up notices in local shops and community centres where the target participant may be more likely to see it. This is excellent promotion of Age Action, increasing their profile and exposure at a very local level.

Health Service

It is important to note in the outcomes for the trust that they represent actual savings as well as freeing up resources for the HSE. The work of the programme reduces the client's dependency on the Health services, such as reducing the services needed from mental health practitioners, doctors, and hospitals. There are also fewer calls to the health service which in turn would demand sending out a social worker. This allows the HSE resources to be directed to those more in need. They act as a referral agent and rely on the Care and Repair programme to provide on-going support to the elderly. They would often utilise the service as well during critical times when someone is in desperate need.

Irish Life

Irish Life knew this programme would make a difference but it did not realize the extent of that difference. This programme benefits the participants, volunteers, tradesmen, supports the development and growth of Age Action as an organisation, decreases reliance on HSE services and most importantly builds infrastructure of local communities. Irish Life has made a true CSR investment that has had significant impact to all those involved.

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12. INDICATORS & PROXIES

	Stakeholder	Outcome	Indicator	Proxy
1.1	Participants	Supported in home	Fewer hours of home help	Cost of home help
1.2		Less stress and anxiety	Less prescription meds and less mental health appointments	Cost of prescriptions and cost of mental health appointments (6 sessions)
1.3		Decrease in isolation-leading to better health	Less GP appointments	Cost of GP appointment
1.4		Increased social inclusion- Increased confidence	Less counseling sessions	Cost of self confidence /self esteem course
1.5		Increased home safety	Fewer Garda call outs and decrease in hospitalizations	Cost of Garda call out (hourly salary) and cost of hospitalization (12.2 days average)

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	Stakeholder	Outcome	Indicator	Proxy
2.1	Volunteers	Giving back to the community- increase in well being (89% reported this change)	Cost counseling sessions	Counseling sessions (6 at €50)
2.2		Higher level of confidence as a result of more social engagement	Change in self confidence	Cost of self confidence /self esteem course
2.3		Increase in development of skills through training and practicing skills	Skill development via training courses	Avg cost of further education/ training course
3.1	Tradesmen	Increase in workload due to referrals	Amount of paid work due to programme	Average amount of pay for job (120 Euros)
3.2		Attending course or training	Skill development through courses	Avg cost of further education/ training course
3.3		Giving back to community and helping older people provides increase in well being	Cost of counseling sessions	Average cost of counseling session (6 sessions)
4.1	Franchise Partners	Community organisations increase service provision through franchise	Cost to create franchise - initial fees only and cost of on-going franchise management support	Cost of set up of franchise and cost of on-going managerial support
5.1	Age Action	Raising the profile of Age Action and increasing donations	First participant experience of Age Action	The cost of advertising and the amount of donations received
6.1	HSE	Freeing up resources to attend to those more in need	Cost of social worker call out	Hourly rate of social worker for a 1 hour visit
7.1	Irish Life	Material outcomes for stakeholders above		

More explicit detail on the determination of the proxy and the sources can be found on the impact map in the Appendix section. All data can be evidenced in either statistics from Age Action's archives or from stakeholder information.

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13. UNINTENDED POSITIVE AND NEGATIVE OUTCOMES

With all the best will in the world some of this good work will result in outcomes that were unexpected. Below are the areas of positive and negative outcomes.

A positive unintended outcome was that families are relieved and feel more comfortable with Care and Repair providing services. Whilst many of the family members may not live close to their parents they are genuinely concerned for their well being and knowing that Care and Repair is there for them makes a huge difference.

Another positive unintended outcome was that simple tasks such as mowing the grass or having someone call round the house provides preventative measures to deter criminals. This in turn made the older people less stressed and anxious. It is a real worry about being targeted especially when people are living on their own with no family nearby.

A third unintended outcome is that volunteers and tradesmen are going back to further education. It was amazing to realize that this programme can motivate a person to go on to do a course furthering their own career.

A final positive unintended outcome was that this initiative has raised the profile of Age Action and helped to increase donations. The outreach of this programme has allowed the services of Age Action reach those in most need. The Franchise Partners spread the word of Age Action and the Care and Repair programme.

An unintended negative outcome was that older people may not be asking family or neighbours for as much help. For many participants surprisingly they would rather go without than ask for any help. There is also a trend where families are not living as close together so sometimes it is not an option for the family to help out when needed.

14. CASE STUDIES

Case Study 1: Client

A woman was widowed and living on her own. She noticed a leaflet about Care and Repair up in her church and felt it was a trustworthy programme so she phoned them. She was so relieved to have a

reliable service that would not exploit her. She has an experience with a 'dodgy' tradesman who charged her too much and did not finish the job properly.

“I can rely on Care and Repair- they are so helpful and pleasant. I find them easy to talk to and it brings much joy when they visit. I would not know who to turn to for help like they provide. The service is invaluable”.

Case Study 2: Volunteers

In one franchise partnership there is an older man who is retired- he is volunteering in order to still remain active. He has partnered up with a younger guy and the two are a comedy act. Clients often request to have the two of them.

“It is an excellent programme and really does make a big difference to our customers. There is a lot of isolation out there and some people are in terrible situations and sometimes it seems there should be a lot more available to alleviate some of the suffering.”

“It is a wonderful concept in that it has a win-win outcome. Apart from bringing comfort and reducing anxiety for older folk, the volunteer gets to meet some wonderful people with great stories. Often you come away from a visit in awe of the strength and character of those you came to visit”.

Case Study 2: Tradesmen

“I have enjoyed the work I do with Care and Repair so much I have decided to go back to do a course in carpentry. It is important that I have a number of skills which can be utilised by the clients. It is amazing how much they appreciate having quality work done for a reasonable price. I feel better when I am providing a reliable service at a reasonable price. Often once I finish the job I will then sit down and have a cup of a tea and a chat with the older person on my own time. They really appreciate the company and chat”.

Case Study 3: Franchise Partner

“When we first were established we were linking up with Age Action and they gave us some info on best practice and guidelines, administration of scheme and completion of scheme- we have adapted the approach, application forms own record book etc. The experience with Age action has been very positive. The seminars in Dublin prove very useful and the advisory committee now provides a link to the other service providers. It is beneficial to talk to other managers to gain a better understanding to what is working well- a lot of community groups have been ringing about advice in developing this programme”.

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Case Study 3: HSE

There was an elderly man whose family contacted Care and Repair to say that his garden was in dire need of being tidied up and mowed. The family was concerned that there were varmints in his garden and that he might be vulnerable to crime as his garden gives the impression that he is not able to take care of it. The elderly man did not want his family to take care of the garden but once the family contacted Care and Repair they were introduced to the man. He was then comfortable with them picking up the garden for him. The Care and Repair team now call him on a regular basis to check in and see if he needs any work done. This makes the family feel more at ease as they know someone is checking up on him regularly and that they can go and do the odd jobs around the house for him.

Case Study 4: HSE

There was a vulnerable elderly man who was at risk of being evicted from his home. Care and Repair working in collaboration with HSE and other organisations went into the man's home and cleaned it up deeming it fit for other support mechanisms to be put in place. Care and Repair volunteers went above and beyond in order to help this man and to ensure he was able to in the short term stay in his home. The HSE representative expressed real concern that this man potentially could have been at risk of being evicted and then homeless as he refusing to accept any accommodation other than his own home.

15. DISCOUNT FACTORS

It is necessary to “discount” the values generated by each of the financial proxies. The following methods are most commonly used with the SROI model:

Attribution: An assessment of how much of the outcome was caused by the contributions of other organisations or people.

Deadweight: An assessment of how much of the outcome would have happened anyway, even if the Care & Repair Programme did not exist.

Displacement: An assessment of how much of the outcome displaced other activities or outcomes that would otherwise have occurred.

Drop-off: In future years, beyond the life of the Care and Repair Programme, the amount of outcome that can be directly attributed to the programme will be greatly reduced as it becomes more influenced by other factors.

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	Outcome	Discount Adjustment	Value Discounted	Rationale
1.1	Supported in home	Deadweight	15%	There are other people supporting the older people in their homes- family and neighbours.
		Displacement	20%	The help of family and/or neighbours could be displaced- but most clients said that they would not ask for help.
		Attribution	5%	There are other community groups that also could be providing support and help achieve the feeling of support.
		Drop off	15%	Without the on-going support of Care and Repair clients will not feel as supported.
1.2	Less stress and anxiety	Deadweight	15%	There are those that are resilient and reliant on themselves- strong character.
		Displacement	10%	There is a small % that will avail of other services that could cause displacement.
		Attribution	5%	Other factors may have played a role.
		Drop off	15%	Without the on-going support of Care and Repair there is some who would feel anxious again.
1.3	Decrease in isolation- better health	Deadweight	10%	Some are involved in community & church groups.
		Displacement	5%	Most clients would not avail of others opportunities within community groups so there is minimal displacement.
		Attribution	0%	Clients reported no other similar provision.
		Drop off	10%	There is an element that clients will decrease feeling less isolated if they are actively involved in the programme.
1.4	Increased confidence	Deadweight	10%	An element of personal success would have gained some of this outcome.
		Displacement	10%	Minimal displacement.
		Attribution	0%	This change is attributed to Care and Repair.
		Drop off	10%	There is an element that clients will increase well being if they are actively involved in other activities.
1.5	Increased home safety	Deadweight	10%	There may have been other influences in creating a safer home.
		Displacement	10%	Improving home safety does have a small % of displacement.
		Attribution	5%	This might be attributed by other factors.
		Drop off	10%	If the clients are not receiving the services there will be some drop off.

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	Outcome	Discount Adjustment	Value Discounted	Rationale
2.1	Increase in well being	Deadweight	5%	An element of personal success would have gained some of this outcome
		Displacement	5%	There is a small % of displacement.
		Attribution	5%	A small % of this increase could have been due to other factors.
		Drop off	10%	Without continuing to be involved in programme there will be drop off.
2.2	Higher level of confidence as a result of more social engagement	Deadweight	5%	An element of personal success would have gained some of this outcome.
		Displacement	5%	There is a small amount of displacement.
		Attribution	5%	Higher confidence may be attributed to other factors.
		Drop off	10%	With direct correlation with the
2.3	Increase in development of skills	Deadweight	0%	There is a direct correlation with the training provided and their personal development.
		Displacement	10%	There is a small % that would have obtained training from another organisation
		Attribution	0%	The skill development is 100% attributed to the training provided by Age Action.
		Drop off	10%	Without the direct training there will be drop off.
3.1	Increase in workload	Deadweight	20%	An element of personal success would have gained some of this outcome.
		Displacement	0%	There is no displacement.
		Attribution	5%	There is a small % that this could be attributed to other factors.
		Drop off	20%	Without the programme there will be significant drop off.
3.2	Attending course or training	Deadweight	10%	An element of personal success would have gained some of this outcome.
		Displacement	0%	There is no displacement.
		Attribution	5%	There may have been other factors that have helped to support gaining additional training.
		Drop off	10%	There is minimal drop off.
3.3	Increase in well being	Deadweight	5%	An element of personal strength may be a factor.
		Displacement	0%	There is no displacement.
		Attribution	5%	There is a slight % that this could be attributed to other factors.
		Drop off	10%	Without involvement with the programme
4.1	Increase service provision	Deadweight	20%	The franchises are responsible for funding their own projects.
		Attribution	10%	There is a slight chance that this organisation would be providing this service without Care and Repair.

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		Drop off	10%	A small % of franchises tend to drop off due to sustainability issues.
5.1	Raising the profile of Age Action	Deadweight	5%	People may have found out on their own about Age Action.
		Displacement	0%	There is no displacement.
		Attribution	5%	Age Action's other programmes may have also supported the increase of the profile.
		Drop off	5%	There is a small % that if there is no continuation the participants may not be as aware of Age Action and its activities.
6.1	Freeing up resources	Deadweight	10%	People may naturally have received services.
		Displacement	10%	Work with clients frees up time spent with social workers- normal activities will continue for other users - a 5% displacement figure has been applied to reflect this.
		Attribution	10%	There is a chance some family may also support the freeing up of resources.
		Drop off	20%	If clients are not using the programme they may not continue to free up resources.

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16. SROI CALCULATIONS

(with above attribution, deadweight and drop off factors applied)

Discount Rate: 4%

Stakeholder	Outcome	Year 2009-11	2012	2013
1.1 Participants	Supported in home	409,462.20	348,042.87	295,836.44
1.2	Less stress and anxiety	264,950.00	225,207.50	191,426.38
1.3	Decrease in isolation-better health	108,502.50	97,652.25	87,887.03
1.4	Increased confidence	118,064.00	106,257.60	95,631.84
1.5	Increased home safety	2,488,010.40	2,239,209.36	2,015,288.42
2.1 Volunteers	Giving back to the community- well being	72,675.00	65,407.50	58,866.75
2.2	Higher level of confidence	49,937.50	44,943.75	40,449.38
2.3	Increase in development of skills	25,920.00	23,328.00	20,995.20
3.1 Tradesmen	Increase in workload	1,814,400.00	1,451,520.00	1,161,216.00
3.2	Attending course or training	21,930.00	19,737.00	17,763.30
3.3	Increase in well being	10,800.00	9,720.00	0.00
4.1 Franchise Partners	Increase service provision	140,000.00	37,000.00	0.00
5.1 Age Action	Raising the profile of Age Action	17,820.00	16,929.00	16,082.55
6.1 HSE	Freeing up resources	4,382.00	3,505.60	0.00
TOTAL €		€4,904,253.60	€4,175,990.43	€3,623,547.76

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A discount value of 4% was applied over the five-year period. This is in line with the cost-benefit analysis guidelines, as set by the Central Expenditure Evaluation Unit (part of the Irish Government's Department for Public Expenditure and Reform) in Ireland which require that public money be discounted at a rate of 4% per annum (revised from 5%).

Total Investment:

€

TOTAL PRESENT VALUE (PV)	11,797,887.12
NET PRESENT VALUE (PV minus investment)	11,097,887.12
SOCIAL RETURN € per €	16.85

SROI Ratio €1: €16.85

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17. SENSITIVITY ANALYSIS

In the sensitivity analysis, the assumptions are reassessed and the impact on the SROI ratio of changing some of the assumptions used. A systematic approach was taken to this part of the analysis by changing each changeable part in turn and seeing how that altered the ratio. The areas altered for each outcome are Financial Proxy, Attribution, Displacement and Deadweight discount factors. The most prominent costs will be put through the sensitivity analysis.

Stakeholder	Outcome	Factor Chosen	Changed to	Ratio changed to
1. 1 Client	Supported in home	Financial Proxy	Less 20% of home visits	1:23.24
		Attribution	10%	1:23.43

Stakeholder	Outcome	Factor Chosen	Changed to	Ratio changed to
1.2 Client	Improved mental health	Financial Proxy	4 sessions instead of 6	1:23.09
		Dead-weight	Increase to 20%	1:23.49

Stakeholder	Outcome	Factor Chosen	Changed to	Ratio changed to
1. 3 Client	Increase in health	Financial Proxy	Decrease by 10% and change cost of app to €40	1:23.44
		Attribution	Change to 10%	1:23.51

Stakeholder	Outcome	Factor Chosen	Changed to	Ratio changed to
1.4 Client	Increase in confidence	Financial Proxy	Change cost of course to €150	1:23.34
		Attribution	Change to 15%	1:23.31

Stakeholder	Outcome	Factor Chosen	Changed to	Ratio changed to
1.5 Client	Increase in safety	Financial Proxy	Change to 8 days in hospital	19.81
		Attribution	Change to 10%	22.84

Stakeholder	Outcome	Factor Chosen	Changed to	Ratio changed to
2.1 Volunteers	Increase in well being	Financial Proxy	Decrease number of vol by 10%	23.51

Stakeholder	Outcome	Factor Chosen	Changed to	Ratio changed to
3.1 Tradesmen	Increase in referrals	Financial Proxy	Change avg of 5 referrals a week to 3	1:19.17
		Dead-weight	Change to 15%	1:20.01

Stakeholder	Outcome	Factor Chosen	Changed to	Ratio changed to
4.1 Franchise Partners	Increase in services	Financial Proxy	Change franchise set up to €4K and mang fee to €2K	1:22.35
		Dead-weight	Change to 20%	1:22.48

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18. CONCLUSIONS & RECOMMENDATIONS

It is apparent from the SROI ratio that this programme delivers significant value. It benefits all parties involved and truly provides for some of those most in need. As this service is preventative in nature it can be challenging to ensure that all measures were included. A conservative approach was taken in order to ensure the programme was not overvalued. The implications and impact this programme has is life changing for some and can save lives. Some elderly would try to complete some of the tasks if there was no one else to help and it would be reality easy for them to fall. If this person lives on their own with no family nearby who knows how long it could take for someone to notice that this person has fallen.

It is amazing how to some a simple task makes a measureable difference. The approach of this programme makes it easier for the older people to ask for help. Asking someone to complete a minor repair is easier than saying to someone I am lonely and I need some support. With two volunteers going out for each minor repair and visit the elderly people feel comfortable and it sets a nice tone for a chat. For some this chat may be the only one they have during the day or the week for that matter.

From the evidence collected and the SROI Ratio generated, it is apparent that increasing the provision to support older people in their homes brings significant benefits to stakeholders and beyond into the community at large:

- For **volunteers**, opportunities to lead fuller and richer lives representing many possibilities, from higher levels of confidence and interest in additional training and further education.
- For **tradesmen**, helping them to build their own businesses, make them feel better about the service they provide and move them into further education.
- For **Franchise Partners**, allowing them to build their infrastructure and provide an additional service that is needed in the community especially to those most isolated.
- For **Age Action**, building the profile, expanding the outreach and reaching those in most need while supporting development of local community service organisations.

- For the **Health Service**, there would be a reduction in the use of resources and potential ongoing financial savings, primarily through less uptake of social workers time but there will also be additional cost savings including nursing homes placements, doctors and hospital appointments due to better mental health and home safety. The Health Service can also better service their clients by making referrals to the Care and Repair programme and tapping into it during crisis situations.
- For **Garda** there are fewer calls from the elderly to report accidents, burglaries and emergencies

Irish Life has created a legacy and a model of best practice for other organisations to emulate. They are to be commended for their commitment both financially and through the on-going guidance and support. The creation of this programme proves that businesses can create true and meaningful CSR partnerships. The partnership between Age Action and Irish Life highlights the potential when organisations work collaboratively together for the greater good.

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Recommendations

Please see below for recommendations.

	Context of Recommendation	Recommendation
1.	Tracking of clients.	Determine a way to track not only jobs, visits etc. but also whether or not it is repeat customer so that Age Action to determine the total number of clients serviced every year.
2.	It can be difficult to distinguish the outputs per franchise partner- prove helpful in determining success of franchises and if support if necessary.	Capture figures per franchise partner for home visits, minor repairs and trade referrals.
3.	Include tracking of trade referrals and number of tradesmen on a regular basis.	This will again allow information to be utilised to gain a better understanding of the outputs in regards to trade referrals.
4.	It can be difficult to distinguish between a home visit and a minor repair as sometimes they are one in the same.	Explore ways to capture the information that reflects the jobs and home visits.
5.	The Care and Repair service is extremely invaluable and there are no other agencies currently providing a similar service but the target group may sometimes be hard to reach.	Continually review ways to market programme- target family members who may be more accessible. Assess different mediums and channels.
6.	Some of the clients/participants may not understand the full range of services provided by Care and Repair as well as Age Action.	Have volunteers remind clients/participants the full range of services available especially what is included within minor repairs.
7.	Age Action has benefited significantly from the Care and Repair programme. This programme has increased the profile of Age Action.	Determine if there are ways to cross sell other services through the C&R programme- or at least inform potential users of the full range of services. It would be also useful to track involvement with Age Action once they have experienced Care & Repair. It is also a good mechanism to distribute any messaging or events that Age Action want to get out.

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19. LIMITATIONS

There are some elements of this project that make it preventative in nature and therefore make it difficult to measure all the outcomes. To some older people this programme is a lifeline- and literally can save lives. There is debate on ways to measure the value of a life. For this report this was not included as it was difficult to measure and to prove. To some the difference is life changing. This SROI has only included only what can be measured.

Also due to the outreach of the programme it was not possible to interview all parties. For some of the older people to participate in this study it was challenging because it meant they needed to answer the phone, be open to taking a phone call from a stranger, and share personal information. For some as well it is difficult to hear over the phone or to fully understand the way the Care and Repair programme operates. For many they know their local volunteers and Care and Repair.

It was difficult to obtain the exact number of clients that have received services from the programme. The number of clients only reflects the groups that were involved in the study. It was too difficult to estimate the total number of clients inclusive of all the programmes (both Age Action and all the franchise partners).

20. APPENDICES

20.1 Age Action Generic Information Vision, Mission & Values

The vision of Age Action is that Ireland is the first country to apply fully the United Nations Principals for Older Persons into our national way of life in order to improve the quality of life of all older people and to transform all our attitudes towards ageing and older people.

Independence

Older persons should have access to the full range of services for their basic needs, to work as long as they wish with access to educational and training programmes, to live in safe and adaptable environments so that they can live at home for as long as they wish.

Participation

Older persons should remain integrated in society, participate actively in the development of policies and services provided for them and act as volunteers in their communities with younger generations.

Care

Older persons should have access to the full range of care and support services that fully respect their beliefs, needs and privacy and their right to make decisions about their care and the quality of their lives.

Self-fulfillment

Older persons should be enabled to achieve their full potential by access to the educational, cultural, spiritual and recreational resources.

Dignity

Older persons should be able to live in dignity and security and be free of exploitation, abuse and discrimination.

Central to our vision is the vital role that older people should take in driving forward these changes for themselves and succeeding generations. Older people must reject the stereotypes of dependency, passivity and inevitable decline fostered by widespread ageism and by their own actions replace them by positive images based on self-confidence, active engagement in personal development, community service and a proper understanding of the ageing process.

Criteria of Success in Achieving Our Vision

- No older person lives in consistent poverty
- No older person should be required to leave their own home because of the lack of community services
- No older person should be excluded from community participation because of the lack of public/private transport
- No older person lives in inadequate housing without basic amenities
- No older person should live alone without social or personal support

The mission statement is - "*To achieve fundamental change in the lives of all older people by empowering them to live full lives as actively engaged citizens and to secure their rights to comprehensive high quality services according to their changing needs*"

This mission statement reflects the fundamental shift in our attitude towards and our relationship with older people. All our activities will be geared to supporting older people to speak and act for themselves in bringing about the fundamental changes they want to live full lives.

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Age Action's objectives are as follows:

- To improve communication and co-operation among the organisations and individuals concerned with ageing and older people.
- To enhance the exchange of information and views about the needs of older people and the development of appropriate policies and services.
- To promote greater interest and involvement in research.
- To assist and undertake innovative projects and services for older people and their carers.
- To assist statutory and voluntary agencies in developing more effective policies and services.

20.2 Irish Life Generic Information

Irish Life's company values are:

- Relentless Pursuit of Customer Satisfaction
- A Great Place to Work

A Team of Winners

Relentless pursuit of customer satisfaction

InTouch Customer 1st is Irish Life's Retail customer satisfaction programme. The programme aims to find out what is important to customers and to do these things as well as possible. Each month it conducts customer satisfaction research as part of a commitment to improve customer service standards. An independent market research company carries out this research on its behalf.

Because financial products can be complicated and difficult to understand, Irish Life is committed to using clear and straightforward language in all customer communications. Irish Life works with the Plain English Campaign, an independent company that specialises in testing the text and layout of documents to make sure that all customer communications meet the highest standards of clarity, openness and honesty. In 2005, Irish Life became the first financial services institution in either Ireland or the UK to be awarded the Honesty Mark by the Campaign for its full range of product literature.

A Team of Winners

Irish Life Retail employs almost 900 people and has more than 750,000 customers in Ireland. Irish Life is committed to the training and development of staff and all staff are subject to training, retraining and continuous assessment.

A Great Place to Work

Irish Life Retail is committed towards improving its local environment and reducing its impact on the global environment by a policy of reduce, re-use and recycle.

The Irish Life Staff Charities was formed in 1995. Each year, Irish Life staff chose two charities and a series of events are held throughout the year to raise money. In 2010, the Staff Charities achieved the milestone of over €1,000,000 raised for charity since 1995.

20.3 Materiality

Reason for Inclusion

Participants/Clients

The participants of the Care and Repair Programme are the main beneficiaries therefore most likely to experience significant change.

Volunteers

The volunteers become involved in the programme for altruistic reasons but end up getting more than expected from their experience in the programme. In the current economic situation there has been an increase in volunteers- it allows people to give back and to do some type of activity if they are not working.

Tradesmen

The tradesmen benefit in multiple ways. They not only benefit financially by receiving referrals but they also benefit emotionally. For many of the tradesmen they become involved in the programme to provide a legitimate service to older people.

Franchise Partners

The franchise partners are pivotal stakeholders in that they allow for the outreach of the Care and Repair programme. The franchise partners customize the programme to meet the needs of the local older people in their area.

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Age Action

Age Action benefit from being involved in the Care and Repair programme not only from managing it but from a marketing perspective. This programme allows Age Action to reach isolated customers.

HSE

They act as referral agents for the programme and benefit significantly. There are cost savings in time of call out and general support in crisis situations. They rely on Care and Repair to help support their clients.

Irish Life

Irish Life are the funders of the programme who have played a pivotal role in development.

Reason for Exclusion

Community Organisations and Voluntary Organisations

A number of community and voluntary group's work in partnership with Care and Repair throughout Ireland. Preliminary research in the early stages of this Study suggested that the large number of groups and different levels of engagement undertaken means any benefit is likely to be too difficult to measure. For this reason, this stakeholder was excluded.

20.4 Stakeholder Aspirations

Stakeholder	Aspirations for Change (expected change)
Participants	To receive help with repairs in the home, receive support or referral from reliable tradesmen To feel less isolated and feel supported as necessary
Volunteers	To give back to community and for some it is keeping themselves involved instead of just being home
Tradesmen	To provide a reliable service at a fair price to older people
Franchise Partners	To create additional services for their local communities
Age Action	To create a programme that provides comfort and security to older people
HSE	Referral agent- wants older people supported in local community
Irish Life	Improved corporate responsibility reputation and community relations

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20.5 Introduction to SROI Methodology

The Social Return on Investment (SROI) model has grown out of recognition that demonstrating added social, economic and environmental value is of increasing importance to third sector organisations and funders. It is a model, or framework, for measuring and accounting for a broad concept of value; value that is generated as a result of actions but that cannot necessarily be accounted for or captured in traditional monetary terms (i.e. it cannot be bought or sold).

The SROI model is used to account for or to identify all of the social, environmental and economic costs and benefits of a particular activity. The approach is to measure these costs and benefits (change) in *“ways that are relevant to the people and organisations that experience or contribute to it. It [SROI] tells the story of how change is being created by measuring social, environmental and economic outcomes and uses monetary values to represent them.”*⁵

SROI uses monetary values to represent the social, environmental and economic costs and benefits of a Programme or activity, enabling an SROI ratio of benefits to costs to be calculated.

The Care and Repair Programmes' SROI ratio can be found in the Report. Whilst the ratio reveals much about its worth, is important to remember that *“SROI is about value, rather than money. Money is simply a common unit and as such is a useful and widely accepted way of conveying value.”*⁶

The SROI ratio is not the whole story; hence this report paints a fuller picture of the ways in which people and organisations experience change as a result of Care and Repair. The ratio does not “stand alone”; it must be understood in the context of all that is uncovered.

⁵ Cabinet Office, Office of the Third Sector: A Guide to Social Return on Investment, 2008

⁶ Cabinet Office, Office of the Third Sector: A Guide to Social Return on Investment, 2008

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20.6 Participant/Client Questionnaire

1. What services have you experienced through the Care & Repair programme?
Home repair _____ Home visit _____ Friendly Call _____ Trade referral _____
2. If you had a repair done what was it?
Minor gardening____ Painting____ Changing fuses, lightbulbs____ Tacking carpets____ Installing handrails____
Hanging curtains/moving furniture____ Installing security locks/chains____ Installing smoke detectors____
3. Has your participation in the Care & Repair Programme made any difference to your day-to-day life?
Yes/ No
4. Is the Care and Repair programme your first experience with Age Action? Yes/No
5. Do you feel that your well being has been positively impacted from using this service? Yes/ No
6. Please rate how the following have changed from your experience with Care and Repair.

Feel supported in your home?	Increase	Decrease	Stayed the same
Feel safe in your home?	Increase	Decrease	Stayed the same
Concerned about being 'ripped-off' by unreliable tradesmen?	Increase	Decrease	Stayed the same
Feeling of isolation?	Increase	Decrease	Stayed the same
Feeling of stress or worry?	Increase	Decrease	Stayed the same
How healthy you feel?	Increase	Decrease	Stayed the same
Overall sense of well being	Increase	Decrease	Stayed the same
7. Are there any other organisations providing similar service? Can you attribute this to other organisations?
8. Please use the space below to tell us some more about the impact of the Care & Repair Programme. For example if you are less concerned about being ripped off if you received a trade referral, you may feel safer in your home if you had a fire detector or locks installed, you may feel less worried if you have had a home visit
.....
9. Does utilising the Care & Repair programme take any pressure off your family/neighbours to support you?
Yes/No
10. Were you asking other people to help you with do repairs or visit you before the Care & Repair Programme that you do not have to ask any more? Yes/ No
11. If "Yes" how many hours per week? _____
12. Were you paying for this help? Yes/ No
If "Yes" how much did you pay per hour? £ _____ per hour
13. If you would like to make any further comments about how the Care & Repair Programme has made a difference to your life or your circumstances please use the space provided.
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20.7 Financial Notes

- For GP visits according to 2/3 of the Irish population do not hold a full medical card according to Benchmarking Ireland's Healthcare system by oireachtas and therefore must pay out of pocket fees for private GP care which can range from €45-€60. For this study the average of €53 per GP visit will be utilized.
- According to the National Counseling Service in Ireland (HSE) 2/3 (28%) of users avail of medium term counseling contracts 7-20 sessions. For the costings in this report 13 sessions was used to reflect the average.
- According to the Irish Association for Counseling and Psychotherapy around four in 10 people attending a counsellor or psychotherapist are suffering from either anxiety or depression. They also found that around one in three of their clients are feeling stressed or having panic attacks.
- Public expenditure on pharmaceuticals is over €2 billion euros per year (as of July 2011 report).
- According to the Department of Health in Ireland the average length of stay in hospital from accidental fall is 12.2 days for older people. Average inpatient stay is 6.6 days. The average cost of inpatient is €75-€750 so for the purpose of this study the average of €412 was utilised.
- A doctor visit typically costs between 50 and 75 Euros. For the purpose this study the lower figure was utilised. 1 in 3 older people falls according to the Health Department.
- Setting up a franchise according to the Irish Franchise Association costs on average €27,375.93 but for the purpose of this report this figure has been decreased by two-thirds because of it being a social franchise. The information on social franchises varies in cost. The annual management fee is on average €10,275 but for the purposes of this study we decreased this by 2/3 to €3,000 as well to make it a more conservative number.

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