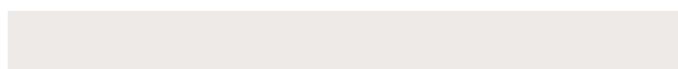




# **OVO Foundation**

## **A Forecast Social Return on Investment Analysis on the Impact of OVO Foundation programmes**



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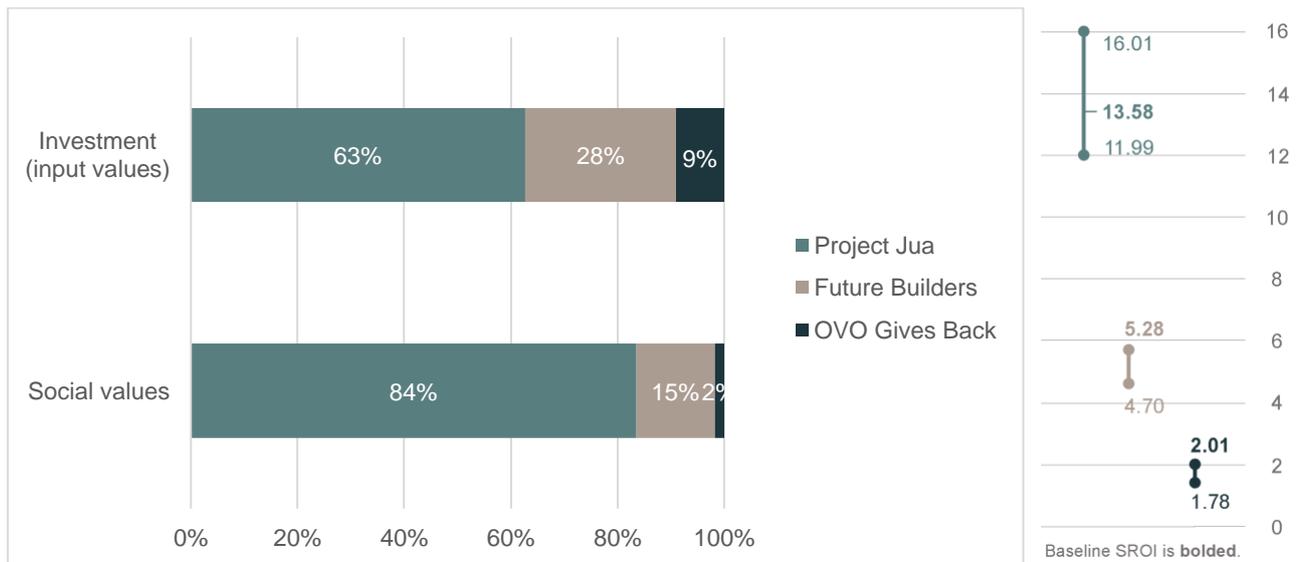
# Introduction

## Overview

This SROI report summarises the results of an independent forecast of the social return on investment (SROI) of three programmes at OVO Foundation. This SROI report was compiled with advice and support from Social Value UK, and a separate SROI report focused on Project Jua has been assured by Social Value International<sup>1</sup>.

The study was conducted between March and August 2021. It is analysed that the average SROI values of the three OVO programmes is GBP 10.19, calculated based on dividing the sum of the combined impact values (i.e. GBP 33,980,478.26) by the sum of the combined input values (i.e. 3,333,693.00) of the three programmes. While Project Jua accounts for 63% of the total investment into these three programmes, it contributes to 84% of the combined social values generated. Respectively, the SROI of Project Jua is in a range of GBP 11.99 to GBP 16.01; the SROI of Future Builders is GBP 4.70 to GBP 5.28; and GBP 1.78 to GBP 2.01 for OVO Gives Back.

Figure 1 SROI values for the three programmes



## Background

OVO Foundation (the Foundation) is OVO Energy’s charity. Created in 2014, OVO Foundation shares the belief of OVO Energy that businesses should be better for everyone. The Foundation’s vision is for all children and young people to have equitable access to a sustainable future. By funding meaningful and impactful organisations and projects, the Foundation wants to make sure that:

<sup>1</sup> The Social Investment Consultancy (2021). [OVO Foundation – A Forecast Social Return on Investment Analysis on the Impact of Project Jua.](#)

- All children and young people have the skills, knowledge, and confidence to take actions on sustainability issues and to help make their own communities more sustainable.
- All children and young people live in a sustainable community.

OVO Foundation supports organisations around issues such as climate crisis, youth poverty and homelessness, educational inequality and access to energy. It invests in projects targeting real and genuine needs, with measurable and meaningful impact, and with a high return on investment. Programmes funded by OVO Foundation are: Project Jua, Future Builders, When I Grow Up<sup>2</sup> and Climate Changers. The Foundation also runs its internal volunteering programme, OVO Gives Back.

OVO Foundation commissioned an independent assessment of SROI on their charitable programmes. Three programmes are covered in the analysis: Project Jua, Future Builders and OVO Gives Back. This report discusses the analysis of the three programmes respectively. The analysis of Project Jua has gone through external assurance by Social Value International. The study thus applies the procedure used in assessing Project Jua to analyse Future Builders and OVO Gives Back, with the analysis endorsed by Social Value UK (SVUK).

The other two programmes (When I Grow Up; Climate Changers) are excluded from the study mainly due to the lack of outcome data and the barrier to proper stakeholder engagement. When I Grow Up was completed in 2021, and an evaluation report was produced for the programme<sup>3</sup>. While evidence for outcomes was collected, the programme evaluation had faced difficulties engaging the main beneficiaries of this programme (such as parents, early year children) due to Covid-19 pandemic. Its evaluation approach was then adapted to focus on the delivery team's response to the crisis, and most of the interviews were only able to be conducted with the delivery teams rather than the end beneficiaries. Outcome data, on the other hand, was mainly qualitative, with challenges presented to gather up-to-date quantitative data around the reach of beneficiaries and the changes experienced by them. As for Climate Changers, most of the programme activities began in 2021, resulting in limited outcome data at the time of this SROI study. While it was possible to engage with the delivery teams, challenges to involve the main beneficiaries (such as educators and students) remained. Due to the rising number of Covid cases in schools at that time and the disruption caused accordingly, the delivery teams had seen schools struggling to engage in a separate evaluation study, sharing that even though compensation was provided, only one person responded in a study they carried out. In light of these barriers for stakeholder engagement and the lack of outcome data, the study thus decided not to include When I Grow Up and Climate Changers in the SROI analysis, in case the process taken could not stay consistent with the Principles of Social Value.

For the three programmes in the study, the evaluation team conducted forecast SROIs, which means an assessment that aims to estimate the social value of the expected changes

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<sup>2</sup> Funding to When I Grow Up was finished in 2021.

<sup>3</sup> [OVO Foundation report: Education Inequality in the early years](#) (2021).

deriving from an intervention. The main purpose of this study is to support OVO Foundation's internal management, hoping that the SROI analysis can help understand the values created thus far and areas of improvement, by taking into account the feedback of charity partners, beneficiaries and stakeholders.

## Purpose and scope

### Project Jua

Project Jua takes place in rural parts of Kenya, where many schools and health clinics do not have reliable electricity. The lack of power and lighting at schools has limited the use of learning facilities such as computers, printers, and projectors and the number of hours available for study. Similarly, many health clinics cannot operate basic health equipment and power fridges to store vaccinations.

Delivered by Energy4Impact, Project Jua aims to improve the health and education of residents in rural Kenya by designing, supplying, installing and maintaining sustainable solar solutions across 300 schools and health clinics in five least developed counties in Kenya, i.e., Turkana, Kilifi, Taita-Taveta, Kwale and Kilifi. Project Jua, in its current form, is a scale up of a pilot conducted between August 2017 and April 2018, that involved solar panel installation of 20 institutions (16 schools and 4 clinics) in Turkana and Kilifi counties in Kenya.

Project Jua is being implemented in two phases: the Implementation Phase (from May 2019 to December 2020) and the Long-Term Sustainability Phase (from January 2021 to December 2023). The forecast uses the SROI framework and principles to measure the social value generated by Project Jua during its implementation phase, which include the following activities:

- Research sites in the hardest to reach rural areas of Kenya.
- Identify and provide electrification using solar energy to remote schools and health clinics in the five least developed counties in Kenya.
- Improve capacity to collect and analyse data and adapt based on lessons learnt.
- Install remote monitoring systems (RMS) to monitor energy consumption and production at each site and troubleshoot where needed.

The SROI study of Project Jua was assured by Social Value International<sup>4</sup> in October 2021.

### Future Builders

The Future Builders programme aims to break the cycle of homelessness by enabling young people who are at risk of or have experienced homelessness to live and work independently. Young people in Bristol, Sheffield, Norfolk and Perth are given the chance to learn how to refurbish semi-derelict houses, turning them into safe and affordable homes for them to live in. The programme also offers training and support for young people to develop skills they

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<sup>4</sup> The Social Investment Consultancy (2021). [OVO Foundation – A Forecast Social Return on Investment Analysis on the Impact of Project Jua.](#)

need and improve their wellbeing. OVO's charity partners delivering this programme are 1625ip, Roundabout, The Benjamin Foundation and The Rock Trust.

The programme started in 2016 in Bristol and has expanded to the other cities in recent years. The forecast focuses on the outcomes of the programme during 2019 to 2020 in the four cities: Bristol, Sheffield, Norfolk and Perth.

### **OVO Gives Back**

OVO Gives Back is OVO's internal programme to give back to the local communities. Each year, the programme provides grants for charities and involves OVO's staff members to volunteer with the charities, hoping to add value to the communities where OVO staff live and work. Since 2016, the programme has supported 23 charities and contributed 6,600 volunteering hours.

The forecast focuses on the activities between 2019 and 2020, during which 15 charities were supported (as listed below; one charity was partnered in both years) and 77 staff members participated in the volunteering. Due to Covid-19, there was no volunteering for six charity partners in 2020 (Number 10-15 in the list below). All charity partners during 2019 to 2020 are:

1. Help Bristol's Homeless
2. Bristol Zoological Society
3. City to Sea
4. The Hackney Pirates
5. Off the Record
6. Clean Up Bristol Harbour
7. Square Food Foundation (supported in both 2019 and 2020. Volunteering activities happened in 2019 but not in 2020.)
8. British Lung Foundation
9. Action for Conservation
10. Dunfermline Foodbank
11. Beam
12. The Matthew Tree Project
13. Caring in Bristol
14. Rowlands
15. Greenspace Scotland

## SROI Methodology

This study adopts the Social Return on Investment (SROI) methodology, which is an outcome-based method to measure and account for all material outcomes in monetary values with consideration of other contributors to the outcomes. A forecast SROI is chosen as the study recognised that within the current timeframe and resources, it could not engage diverse stakeholders comprehensively. However, through the stakeholders sampled and data collection methods conducted, the study is able to estimate the social value the three programmes are likely to create at the end of its intervention. The report will discuss recommendations for future studies that aim to evaluate the programmes' SROI in [this section](#).

The assessment follows “[The Seven Principles of Social Value](#) (Social Value International, 2018)” and the six steps stated in “[A guide to Social Return on Investment](#) (2012, UK Cabinet Office)”. The report also acts on the eight principle published by SVUK in October 2021. This section explains how the methodology is applied to calculate the forecast SROI of Project Jua, Future Builders and OVO Gives Back.

### Principles of SROI

Following the seven principles of SROI, this study has engaged stakeholders across the three programmes in a range of ways to understand material outcomes, gather evidence and value changes. Below gives an overview of what the principles are and how they are applied.

*Table 1 Application of SROI principles in the evaluation*

SROI Principle	Application in this analysis
1. <b>Involve stakeholders</b> – Inform what gets measured and how this is measured and valued in an account of social value by involving stakeholders.	Depending on the types of stakeholders, they are engaged at different stages of the assessment process and in different ways to ensure accessibility. Stakeholders are engaged to identify outcomes, measure outcomes and value the extent of changes.
2. <b>Understand what changes</b> – Articulate how change is created and evaluate this through evidence gathered, recognising positive and negative changes as well as those that are intended and unintended.	Stakeholders were involved to refine the existing Theory of Change, based on which a new Theory of Change was created with new outcomes identified. This helped establish further data collection tools to understand the changes as perceived by wider stakeholders, negative and unintended outcomes.
3. <b>Value the things that matter</b> – Making decisions about allocating resources between different options needs to recognise the values of stakeholders. Value refers to the relative importance of	The relative importance of different outcomes is evaluated based on the feedback of stakeholders who would experience the outcomes. This report shows analysis of stakeholders' preferences and includes their feedback.

different outcomes. It is informed by stakeholders' preferences.	
4. <b>Only include what is material</b> – 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.	The decision of materiality is based on the perspective of stakeholders, from whom data were gathered and analysed to deduce the outcomes that are relevant and significant to stakeholders.
5. <b>Do not over-claim</b> – Only claim the value that activities are responsible for creating.	Stakeholders were involved to understand the value that the programmes could claim. This involved assessing deadweight, attribution, displacement and drop-off. Sensitivity analysis was conducted to test assumptions.
6. <b>Be transparent</b> – Demonstrate the basis on which the analysis may be considered accurate and honest, and show that it will be reported to and discussed with stakeholders.	The Theory of Change was created with stakeholders and concepts of SROI were discussed alongside. This report also details the logic, calculations, assumptions and the like, so that readers can provide feedback on its accuracy.
7. <b>Verify the result</b> – Ensure appropriate independent assurance.	The findings in the valuation have been verified by stakeholders, including the funder, the charities involved and the beneficiaries at three programmes. The SROI report of Project Jua has been assured by Social Value International, and the study incorporated the learnings from the assurance process for the other two programmes. This report will be reviewed by Social Value UK to ensure its fulfilment of SROI principles, standards and process.
8. <b>Be responsive</b> – Pursue optimum Social Value based on decision making that is timely and supported by appropriate accounting and reporting.	The report makes suggestions to future evaluation, OVO Foundation evaluation and monitoring activities and programme delivery, which different parties can use to improve their decision making on evaluation and programme.

## Evaluation approaches

Building on [six suggested steps](#) of SROI, this study has applied 8 stages to conduct SROI analysis, which is explained in the sections below. The stages, though listed chronologically, did not happen sequentially. Some stages may overlap with others in terms of when they occurred, but are listed in chronological order for clarity.

### Stage 1: Establishing evaluation scope

The scope of the SROI studies was first agreed with OVO Foundation and further consulted with the respective programme delivery teams. OVO Foundation wanted to conduct SROI for its overall activities to understand the impact generated by its charitable investment over the recent years. After a review of previous data collected across programmes, it was agreed that the evaluation should cover the timespan between 2019 to 2021, during which the majority of programmes had activities. For Project Jua, this time frame corresponds to its scale-up phase. It was then agreed that the SROI should help understand how the project has benefited the 250 schools and 50 clinics in the five counties in rural Kenya (Kilifi, Kwale, Taita Taveta, Turkana and Isiolo) over the scale-up phase. For Future Builders, as four cities (Bristol, Sheffield, Norfolk and Perth) were involved during this timeframe, it was decided that the SROI covers the changes that happen for the young people in these four cities. As for OVO Gives Back, 15 charities and over 70 OVO staff were involved during 2019 to 2021; thus, the SROI aims to understand the changes contributed by OVO Foundation to them. The three programmes' delivery teams were further involved to inform data collected so far and to identify wider stakeholder groups and outcomes.

### Stage 2: Identification of stakeholders

To identify the key stakeholders that could be impacted by the programmes, the study invited key members at OVO Foundation and respective programme delivery teams to workshops. Stakeholders involved in the workshops were:

- **Project Jua:** Energy4Impact and Project Jua's research partner at Imperial College London.
- **Future Builders:** 1625ip, Roundabout, The Benjamin Foundation and The Rock Trust.
- **OVO Gives Back:** Charity partners and OVO staff volunteers.

During the workshops, a list of direct and indirect stakeholders were identified. Direct stakeholders were then surveyed to inform other stakeholders. The differences between direct and indirect stakeholders are:

- **Direct stakeholders:** stakeholders that are either directly involved in the project activities or directly experienced the changes to the project aims to bring.
- **Indirect stakeholders:** stakeholders that are not involved in the project activities but may benefit from the changes the project brings or be interested in the outcomes of the project.

The table below shows the stakeholder groups, sub groups (identified through conversations with the delivery teams) and the reasons why they were, or were not, included for engagement.

## Project Jua

Table 2 Inclusion of stakeholders for Project Jua

Stakeholders	Sub groups	Included in SROI?	Reasons for inclusion or exclusion
<b>Direct stakeholders</b>			
Project delivery team (Energy 4Impact)	Project management team	Included	They implement the project in Kenya and have comprehensive understanding of the project from its induction until now.
	Onsite project staff members	Included in data collection support but excluded from evidence provision	The study relies on onsite staff members in rural areas of Kenya to collect data from local schools and clinics. They are excluded from providing evidence in order to ensure the independence of their support in data collection. Also, the project management team can already play the role of providing details of the project, as they have general oversight.
	Research partner	Included	They have conducted research around electricity system performance of the project, which is related the main activities of the project.
Funder	OVO Foundation	Included	They provided funding for the project, including its pilot and scale-up phases.
	Other potential funders	Excluded	The project team has not yet proactively reach out to other potential funders, who may be interested in providing further funding.
Schools in rural parts of Kenya	Teachers	Included	Teachers are intended beneficiaries to be supported in their work to provide education to students more effectively.
	Students	Partially included	Students at the local schools are one of the intended beneficiaries, but it was not possible to consult them directly during the span of this evaluation due to time constraints to directly engage the students. Their perspectives, however, were recorded in videos in June 2019 and additional documentation will be carried out by Energy4Impact in July 2021, though beyond the span of this evaluation. This study thus used existing videos to

			supplement the limitation of direct engagement with students.
Clinics in rural parts of Kenya	Health professionals	Included	Health professionals are intended beneficiaries of this project.
	Patients	Partially included	During the span of this evaluation, it was not possible to consult patients directly due to time constraints to directly engage the patients. However, some patients were interviewed by Energy4Impact in July 2021, though after this evaluation underwent assurance. This study thus used generalised patient data in the calculation.
<b>Indirect stakeholders</b>			
Local communities	Local electricians	Excluded	They could benefit from the project but are not direct beneficiaries. Outcomes related to them were also considered not as important by direct stakeholders such as teachers and clinics.
	Local business	Excluded	
	Other community members	Excluded	
	Environment (or the future generation in the local communities)	Included	Environment was not a stakeholder directly identified by other stakeholders. However, as other stakeholders have identified carbon emissions and the sustainability of local communities as outcomes of the project, the study thus includes “environment” as a proxy stakeholder for the future generation in the local communities.
Government	Local county governments	Excluded	They have supported the development of the five counties the project seeks to impact, though via providing different resources from those in this project. Their roles are factored in the valuation.
	Central government	Excluded	They may be interested in or indirectly supporting rural development but are not directly involved in this project.

During the timespan of this evaluation, onsite project staff members were at three counties (Kilifi, Kwale and Taita Taveta) and were able to support data collection with local schools and clinics in the three counties. As the five counties were selected for Project Jua based on similar reasons from the needs assessment, this study thus assumes that similar outcomes could be applied to the two counties excluded in the data collection for the SROI study.

### **Future Builders**

*Table 3 Inclusion of stakeholders for Future Builders*

Stakeholders	Subgroups	Included in SROI?	Reasons for inclusion or exclusion
<b>Direct stakeholders</b>			
Funder	OVO Foundation	Included	They provided funding for the project
Charity partners	1625ip	Included	They delivered the programme in each city.
	Roundabout		
	The Benjamin Foundation		
	The Rock Trust		
Young people (YP) who are at risk of or have experienced homelessness	YP in Bristol	Included	They are the intended beneficiaries in the programme.
	YP in Sheffield		
	YP in Norfolk		
	YP in Perth		
<b>Indirect stakeholders</b>			
Local communities	Local authorities	Excluded	Charity partners mentioned that local authorities could see how beneficial it is to bring properties back to use and how easily it can be done. They may benefit from Future Builders' achievement but are not directly involved in the project.
	Society	Excluded	
External partners	Corporates	Excluded	Charities work with some corporates to renovate the homes. They are excluded as they are only involved in the renovation but not the changes for the intended beneficiaries.

## OVO Gives Back

Table 4 Stakeholders for OVO Gives Back

Stakeholders	Subgroups	Included in SROI?	Reasons for inclusion or exclusion
<b>Direct stakeholders</b>			
Funder	OVO Foundation	Included	They provided funding for the project.
Charity partners	In 2019 (Charities that have both received grants and supported volunteering days.)	Included	They supported the delivery of the programme and have also benefited from the programme.
	In 2020 (Charities that have only received OVO's grants.)	Included	

OVO staff	Staff that have participated in the volunteering days	Included	They are the intended beneficiaries in the programme. They also contribute to the programme through volunteering.
	Other staff	Excluded	They might be influenced by their colleagues who have participated in the volunteering, such as being inspired to volunteer or being benefited in a more positive work environment. They are excluded as they did not participate in the programme directly.
<b>Indirect stakeholders</b>			
Local communities	Communities where OVO staff volunteered	Excluded	They could benefit from volunteering but the changes are possibly too indirect.

Due to the limitations of direct engagement to understand the perspectives of some stakeholders, the potential bias is considered in the sensitivity analysis of this evaluation, to reflect the risks in assumptions and data collection accuracy.

### Stage 3: Engaging stakeholders

For the stakeholders included in this analysis, they were engaged through various ways, including workshops, surveys and a review of video interviews (based on Project Jua's previous data collection), across different stages of the evaluation. The engagement was on a voluntary basis, which means some stakeholders invited may choose not to participate. For stakeholder groups with larger numbers of people (i.e., schools and clinics at Project Jua; Young people at Future Builders; OVO staff volunteers at OVO Gives Back), random sampling was applied.

At the first phase, programme delivery teams and the funder were involved to refine the existing Theory of Change for their respective programmes, based on which a new Theory of Change was created with new outcomes identified. Through surveys, other direct stakeholders were invited to share their perception of the importance of the identified outcomes and additional outcomes. During the timespan of the study, all direct stakeholders from the three programmes could be involved in the study, except for children and patients at Project Jua. To estimate the changes happening to them, teachers and health professionals were asked to share their observations of these outcomes on children and patients. Children's perspectives of changes were supplemented by interview videos done previously, while there were no interview videos with patients.

For more details on how stakeholders were involved, please see the tables above about the inclusion of stakeholders and the tables below about the engagement with stakeholder groups. For more details on the judgement of how the outcomes were included, please see the discussion around materiality in the sections about material outcomes for the respective programmes. Stakeholders were also involved to verify the SROI results, which will be presented in the section of Stage 8: Reporting, verification and recommendations.

## Project Jua

Table 5 Engagement with stakeholder groups at Project Jua

Stakeholders	Subgroups	Engagement method	No. of samples out of total stakeholders (%)
Project delivery team (Energy 4Impact)	Project management team	<b>Step 1:</b> Workshop to refine existing Theory of Change <b>Step 2:</b> Discuss the data collected from schools and clinics <b>Step 3:</b> Verify the report draft	<b>1:</b> 4/4 (100%)  <b>2:</b> ¼ (25%) – with the project manager  <b>3:</b> 2/4 (50%)
	Research partner	<b>Step 1:</b> Workshop to refine existing Theory of Change	<b>1:</b> 1/3 (33.3%)
Funder	OVO Foundation	<b>Step 1:</b> Workshop to refine existing Theory of Change <b>Step 2:</b> Verify the report draft	<b>1:</b> 2/2 (100%)  <b>2:</b> 2/2 (100%)
Schools in rural parts of Kenya	Teachers	<b>Step 1:</b> handwritten survey conducted onsite (random sampling) in 3 out of 5 counties to review and identify material outcomes, as well as negative and unintended outcomes <b>Step 2:</b> Verify the report draft	<b>1:</b> 49/250 schools (19.6%) Kilifi: 19/59 (32.2%) Kwale: 18/68 (26.5%) Taita Taveta 12/12 (100%)  <b>2:</b> aiming at 10-20% of the survey participants
	Students	<b>Step 1:</b> review their attendance and performance baseline <b>Step 2:</b> review past video interviews with students to revise the outcomes	<b>1:</b> 86,226 students  <b>2:</b> 4 students
Clinics in rural parts of Kenya	Health professionals	<b>Step 1:</b> handwritten survey conducted onsite in 3 out of 5 counties to review and identify material outcomes, as well as negative and unintended outcomes <b>Step 2:</b> Verify the report draft	<b>1:</b> 16/50 clinics (32%) Kilifi: 4/8 (50%) Kwale: 4/12 (33.3%) Taita Taveta 4/14 (28.6%)  <b>2:</b> aiming at 10-20% of the survey participants
	Patients	<b>Step 1:</b> review patient baseline	<b>1:</b> 8264 patients
Local communities	Environment (or the future generation in the local communities)	<b>Step 1:</b> review energy consumption data tracked for schools and clinics	<b>1:</b> Energy data are tracked automatically, yet analysed data are only available from a school and a clinic. The study uses available data to estimate the

			energy consumption at all sites.
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## Future Builders

Table 6 Engaging the stakeholders at Future Builders

Stakeholders	Subgroups	Engagement method	No. of samples out of total stakeholders (%)
Funder	OVO Foundation	<b>Step 1:</b> Workshop to refine existing Theory of Change <b>Step 2:</b> Verify the SROI calculation	<b>1:</b> 2/2 (100%) <b>2:</b> 2/2 (100%)
Charity partners	1625ip	<b>Step 1:</b> Workshop to refine existing Theory of Change <b>Step 2:</b> Review outcome data provided by charities <b>Step 3:</b> Verify the SROI calculation	<b>1:</b> 13/14 (93%) 13 out of 14 charity staff invited <b>2:</b> 4/4 (100%) 4 charities <b>3:</b> 3/4 (75%) 3 charities
	Roundabout		
	The Benjamin Foundation		
	The Rock Trust		
Young people (YP) who are at risk of or have experienced homelessness	YP in Bristol	<b>Step 1:</b> handwritten survey conducted onsite (random sampling) to review and identify material outcomes, as well as negative and unintended outcomes <b>Step 2:</b> Verify the SROI calculation through the support from charity partners	<b>1:</b> 18/88 (20.5%) <b>2:</b> Young people are engaged by the charity partners to verify the SROI analysis. 7 young people were involved.
	YP in Sheffield		
	YP in Norfolk		
	YP in Perth		

## OVO Gives Back

Table 7 Engaging the stakeholders in OVO Gives Back

Stakeholders	Subgroups	Engagement method	No. of samples out of total stakeholders (%)
Funder	OVO Foundation	<b>Step 1:</b> Workshop to refine existing Theory of Change <b>Step 2:</b> Verify the SROI calculation	<b>1:</b> 2/2 (100%) <b>2:</b> 2/2 (100%)
Charity partners	In 2019 (Charities that have both received grants and supported volunteering days.)	<b>Step 1:</b> Workshop to refine existing Theory of Change <b>Step 2:</b> Online survey to review and identify material outcomes, as well as	<b>1:</b> 2/9 (22%) <b>2:</b> 7/9 (78%) <b>3:</b> 2/9 (22%) All charities were invited to verify the SROI analysis, with two providing comments.

	In 2020 (Charities that have only received OVO's grants.)	negative and unintended outcomes <b>Step 3:</b> Verify the SROI calculation	<b>1:</b> 0/7 (0%) All seven charities were invited to the workshop though no one was able to join. <b>2:</b> 4/7 (57%) <b>3:</b> All charities were invited to verify the SROI analysis, though no one replied in the end.
OVO staff	Staff that have participated in the volunteering days	<b>Step 1:</b> Workshop to refine existing Theory of Change <b>Step 2:</b> Online survey to review and identify material outcomes, as well as negative and unintended outcomes <b>Step 3:</b> Verify the SROI calculation	<b>1:</b> 5/8 (63%) Eight staff were invited to the workshop. <b>2:</b> 11/51 (22%) 77 staff have volunteered yet only 51 of these staff are still working at OVO. <b>3:</b> 1/11 (9%) Staff who were involved in the survey were invited to verify the SROI analysis, though only one provided feedback.

#### Stage 4: Refining Theory of Change

Prior to this SROI, Theories of Change for the three programmes were developed in line with the overall Theory of Change of OVO Foundation. The existing Theories of Change were drafted based on a review of all documentation about project objectives, impact data collected and existing reporting to OVO Foundation, alongside reference to the research in contexts similar to the programmes. The draft Theories of Change were then validated with OVO Foundation managers, charity partners and Trustees, followed by the creation of impact evaluation frameworks, including outcomes, indicators, sources of evidence and means of verification.

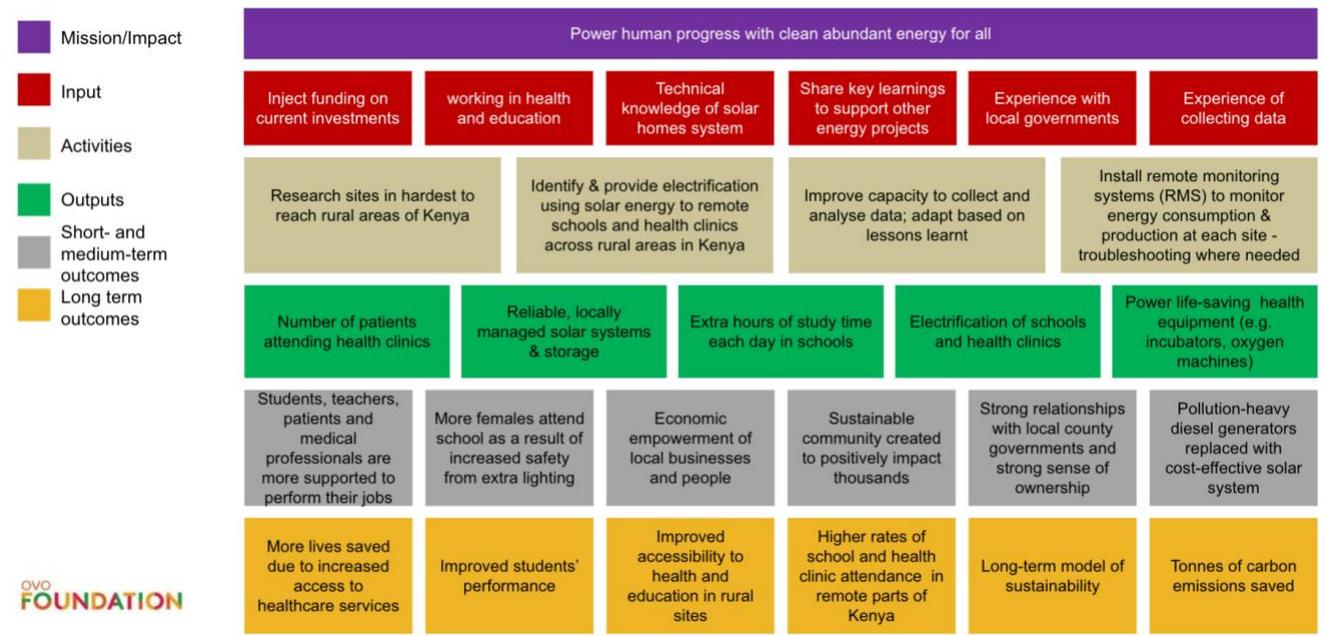
Stakeholders (the funder and the delivery teams) were then invited to workshops to feedback on the existing Theories of Change, in order to adapt the inputs, outputs, and short-, medium- and long-term outcomes. The participants also helped map out other stakeholder groups (with whom the study consulted at the later stages) and identify some other outcomes that may be relevant to them but not in the existing Theories of Change. This was also the first time when stakeholders discussed materiality of outcomes and whether to include certain outcomes or not. The questions discussed in the workshop are included in the Appendices.

Wider stakeholders were surveyed to value the relevance and importance of each outcome and identify any other positive and negative outcomes. For Project Jua and Future Builders, the surveys were administered in person by the programme delivery teams. There were informal conversations between the programme delivery teams and the survey participants, which provided feedback on how to refine the outcomes and define the chain of events. However, due to the challenges already mentioned the tables about inclusion of

stakeholders (especially for Project Jua), as well as stakeholders' experience of time poverty, the definition of outcomes might not have sufficient engagement from stakeholders as it could have had in an ideal world, where we would have asked stakeholders to define the outcomes themselves. Despite the constraints, this study is still confident that the outcomes included reflect what stakeholders consider to be the most relevant and important. The process to develop the impact maps with the stakeholders is explained below.

## Project Jua

Figure 2 Existing Theory of Change for Project Jua



The surveys to schools and clinics included almost all the outcomes presented in the original Theory of Change, with the exception of two environment-related outcomes that the evaluator thought could be challenging for the survey participants (teachers and health professionals) to answer: “Long-term model of sustainability” and “Tonnes of carbon emissions saved”. The reason was that the direct stakeholder of these two outcomes is the environment, while indirect stakeholders to these outcomes were the ones being surveyed. As the survey participants might not be the ones that directly experienced the outcomes, it could be difficult for them to share perceptions on these. To gain feedback on the outcome “Long-term model of sustainability”, the evaluator combined it with another outcome “Sustainable community created to positively impact thousands” and rephrased it as “My communities become more sustainable”, to make it more tangible for participants to answer. As for “Tonnes of carbon emissions saved”, the study did not ask survey participants' opinions but used the energy consumption data gathered directly from the installed photovoltaic systems.

The survey findings have proved that some outcomes are less important than others, which is factored in the SROI analysis. For more details on the judgement of how the outcomes were included, please see the discussion around materiality in these sections: Material outcomes for schools, Material outcomes for clinics, Material outcomes for the environment and Displacement for outcomes. Survey questions are included in the Appendices.

When the project delivery team was administering the surveys to review and identify material outcomes, stakeholders also were asked about the phrasing of these outcomes and whether they reflected how they would also describe the outcomes. Participants shared informally with the project delivery team on the chain of events and outcomes identified. The video interviews with students and qualitative feedback on the surveys to teachers and health professionals also helped the definition of the chain of events. When the new impact maps for different stakeholders were created, the evaluator consulted the project delivery team to verify the rationale.

While the original Theory of Change focuses on the relationships between activities, inputs, outputs and outcomes, SROI requires the mapping of changes for each stakeholder, as an Impact Map. Some outcomes, such as school attendance, may seem more like an output in other contexts. However, in the context of rural Kenya, where access to education<sup>5</sup> and health service<sup>6</sup> is a massive challenge<sup>7</sup>, these outcomes are of great importance to the stakeholders, and actually require multi-dimensional efforts to achieve, such as providing access to reliable energy; increasing the availability of education and health resources (which are more outputs).

In addition, some outcomes reflected the changes stakeholders perceived. For example, short-/ medium-term outcomes identified as “More students attend schools” and “Students attend schools more often” correspond with children’s feedback on how solar energy has helped them in study, *“Solar panels will cause difference because we be able to study during the night and we’ll be able to extend time for revising for exams. And we will be also able to study during the morning preps [, which was] a great challenge”; and also, “having the solar, the solar panels in our school, will help us a great deal, because we will extend the studying hours in our school, and also as a school we will be able to purchase electronic devices such as computers, and also printers”.*

As the ultimate aim of Social Value International (SVI) is to “reduce inequality and environmental degradation and improve wellbeing”, the study attempted to rephrase some outcomes to describe the wellbeing of stakeholders, as in Table 4. However, the languages were revised after the consultation with stakeholders, which means the original outcomes were used in the survey to stakeholders. Hence, original languages could be seen in some sections in the report, such as materiality discussion (Material outcomes for schools; Material outcomes for clinics) and deduction (Duration/drop-off for outcomes).

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<sup>5</sup> Takayanagi, T. (2021). [Between Development and Tradition: Pre-Primary Education in Rural Kenya.](#)

<sup>6</sup> Kabia, E., Mbau, R., Oyando, R. et al (2019). [“We are called the et cetera”: experiences of the poor with health financing reforms that target them in Kenya.](#) Int J Equity Health 18, 98.

<sup>7</sup> While Free Primary Education has been implemented in many countries, there remain huge barriers for students to attend schools. For example, research found that severe poverty makes gaining education and retaining at schools unrealistic for many Kenyan children, yet the poverty rate in Kenya is 34-42% in 2013, estimated by World Bank. Nampushi, J., Welsh, N. (2015). [Access issues in Kenyan primary education.](#)

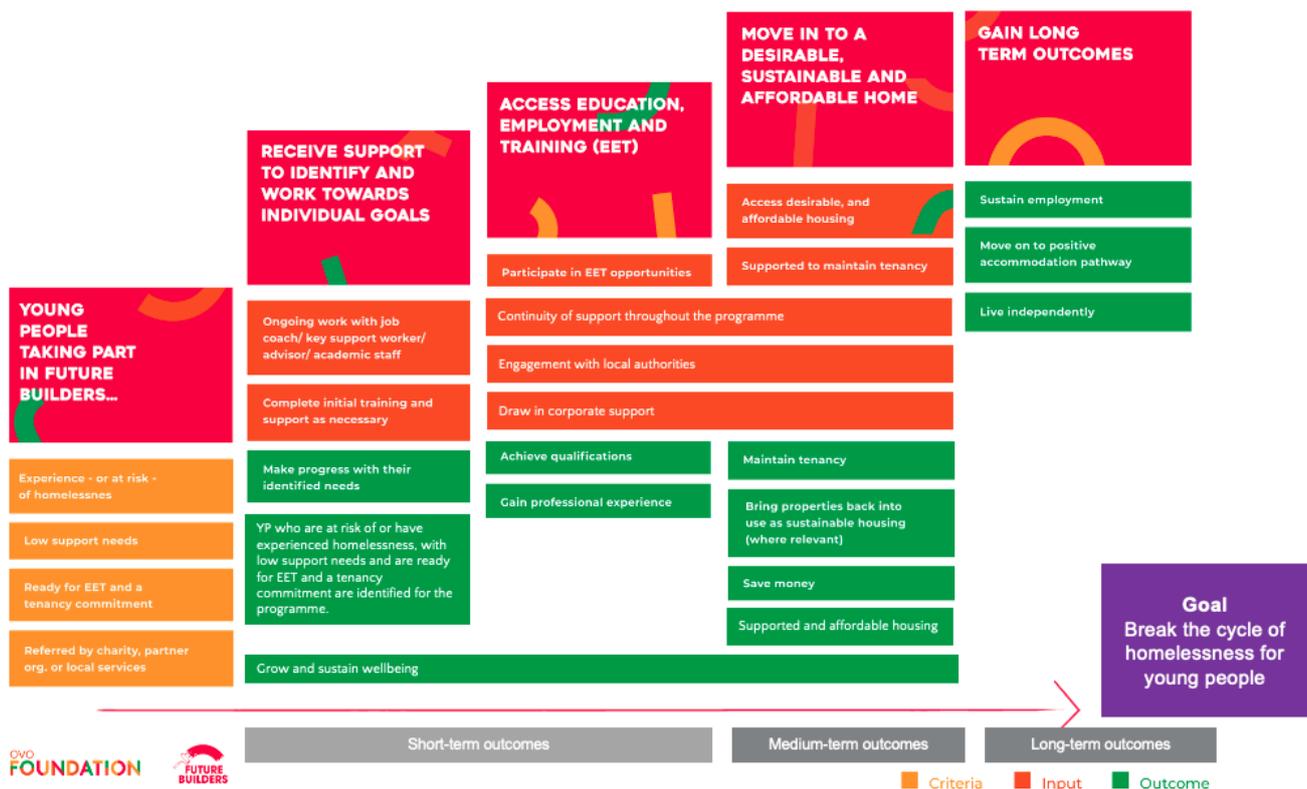
Table 8 Consideration of wellbeing in outcomes

	Original	Rephrased
Short-/ medium-term outcomes	More students attend schools.	Students feel supported to study.
	Students attend schools more often.	Students feel supported to study.
	More females attend school due to increased safety from extra lighting.	Females feel safe to attend schools.
Long-term outcomes	Higher rates of school attendance in remote parts of Kenya.	Students have better learning experience.
	Higher rates of clinic attendance in remote parts of Kenya.	Patients feel supported to access health services.

Through the above-mentioned consultation with stakeholders and considerations about the framing of outcomes, an Impact Map was developed in Table 5.

## Future Builders

Figure 3 Existing Theory of Change for Future Builders



Young people were surveyed to value the relevance and importance of each outcome and identify any other positive and negative outcomes. All outcomes related to the young people were presented to them in a survey (survey questions are included in the Appendices). Through the consultation, some outcomes were identified as not material, which will be discussed in [this section](#).

Some outcomes, such as saving money, may seem more like an output in other contexts. But for people who are at risk of or have experienced homelessness, saving money is crucial to help them move on in their life. Research<sup>8</sup> has provided evidence for such importance, while a third of people who are at risk of or have experienced homelessness are not able to save any money during their time at living in supported accommodation. Over three-quarters of those surveyed believe that support to help them save or pay for a deposit would be important in helping them move on and pay for deposit. With desk-based research for the context and consultation with stakeholders, an Impact Map was developed in Table 10.

### OVO Gives Back

OVO staff volunteers and charity partners were surveyed to value the relevance and importance of each outcome and identify any other positive and negative outcomes. All outcomes relevant to the respective stakeholder groups were included in the surveys (survey questions are included in the Appendices). An Impact Map was developed in Table 11.

Figure 4 Existing Theory of Change for OVO Gives Back



<sup>8</sup> Crisis (2016). [Home. No less will do: Improving access to private renting for single homeless people.](#)

Table 9 New Theory of Change/Impact Map for Project Jua

Impact/mission: Power human progress with clean abundant energy for all

Stakeholders	Subgroups	Inputs	Outputs	Short-/ medium-term outcomes	Long term outcomes
Schools in rural parts of Kenya	Teachers	<ul style="list-style-type: none"> <li>• Funding to the project.</li> <li>• Working in health and education.</li> <li>• Technical knowledge of solar homes system.</li> <li>• Share key learnings to support other energy projects.</li> <li>• Experience with local governments.</li> <li>• Experience of collecting data.</li> </ul>	<ul style="list-style-type: none"> <li>• Electrification of schools.</li> </ul>	<ul style="list-style-type: none"> <li>• Teachers are supported to perform their jobs.</li> </ul>	<ul style="list-style-type: none"> <li>• Improved accessibility to education in rural sites.</li> <li>• Students have better learning experience.</li> <li>• Students perform better.</li> </ul>
	Students		<ul style="list-style-type: none"> <li>• Extra hours of study time each day in schools.</li> </ul>	<ul style="list-style-type: none"> <li>• Students feel supported to study.</li> <li>• Females feel safe to attend schools.</li> </ul>	
Clinics in rural parts of Kenya	Health professionals	<ul style="list-style-type: none"> <li>• Experience with local governments.</li> <li>• Experience of collecting data.</li> </ul>	<ul style="list-style-type: none"> <li>• Electrification of clinics.</li> <li>• Power life-saving health equipment (e.g., incubators, oxygen machines).</li> </ul>	<ul style="list-style-type: none"> <li>• Medical professionals are more supported to perform their jobs.</li> <li>• Clinics have access to reliable and clean energy.</li> <li>• Clinics saved costs on electricity.</li> </ul>	<ul style="list-style-type: none"> <li>• Improved accessibility to health in rural sites.</li> <li>• Patients feel supported to access health services.</li> <li>• More lives saved due to increased access to healthcare services.</li> </ul>
	Patients		<ul style="list-style-type: none"> <li>• Number of patients attending health clinics.</li> </ul>	<ul style="list-style-type: none"> <li>• Patients received more support on healthcare.</li> </ul>	
Local communities	Environment	<ul style="list-style-type: none"> <li>• Experience of collecting data.</li> </ul>	<ul style="list-style-type: none"> <li>• Reliable, locally managed solar systems and storage.</li> </ul>	<ul style="list-style-type: none"> <li>• Pollution-heavy diesel generators replaced with cost-effective solar system</li> <li>• Local communities become more sustainable.</li> </ul>	<ul style="list-style-type: none"> <li>• Tonnes of carbon emissions saved.</li> </ul>

Table 10 New Theory of Change/Impact Map for Future Builders

Impact/mission: Break the cycle of homelessness for young people.

Stakeholders	Subgroups	Inputs	Outputs	Short-term outcomes	Medium-term outcomes	Long term outcomes	
Young people (YP) who are at risk of or have experienced homelessness	YP in Bristol	<ul style="list-style-type: none"> <li>• Funding to the programme.</li> <li>• Continuity of support throughout the programme.</li> </ul>	Ongoing work with job coach/ key support worker/ advisor/ academic staff in the programme.	<ul style="list-style-type: none"> <li>• Make progress with identified needs.</li> <li>• Be ready for education, employment and training.</li> </ul>	<ul style="list-style-type: none"> <li>• Achieve qualifications.</li> <li>• Gain professional experience.</li> </ul>	Sustain employment.	Live independently
	YP in Sheffield		Access to affordable housing.				
	YP in Norfolk						
	YP in Perth						

Table 11 New Theory of Change/Impact Map for OVO Gives Back

Impact/mission: Add value to the communities where OVO staff live and work.

Stakeholders	Subgroups	Inputs	Outputs	Short-/ medium-term outcomes	Long term outcomes
OVO staff	Staff that have participated in the volunteering days	<ul style="list-style-type: none"> <li>Staff support charity partners through volunteering.</li> <li>Funding to support activities benefiting children and young people in local communities.</li> </ul>	<ul style="list-style-type: none"> <li>Funding distributed across projects.</li> <li>Staff participate in volunteering.</li> <li>Increased value for charity partners and their beneficiaries receiving support.</li> </ul>	<ul style="list-style-type: none"> <li>Staff feel more positive about working at OVO.</li> <li>Staff feel inspired to volunteer again.</li> <li>Staff feel connected to their local communities and/or the areas near their offices.</li> <li>Staff feel contributing to improving OVO's relationship with local communities.</li> </ul>	OVO staff play an active role supporting local organisations focusing on the development of CYP
Charity partners	In 2019 (Charities that have both received grants and supported volunteering days.)			<ul style="list-style-type: none"> <li>Charities meet their anticipated outcomes because of the help of OVO volunteers.</li> <li>Charities meet their anticipated outcomes because of OVO's grant funding</li> </ul>	Local organisations focusing on the development of CYP are better supported.
	In 2020 (Charities that have only received OVO's grants.)			<ul style="list-style-type: none"> <li>Charities meet their anticipated outcomes because of OVO's grant funding</li> </ul>	

## Stage 5: Evidencing outcomes and giving them value

During the creation of the Impact Map, stakeholders were surveyed to rate the occurrence, importance and duration of the short- and medium-term outcomes (question list in the appendices), which are expected to contribute to the long-term outcomes. The study then assessed outcome materiality, i.e., whether an outcome is both relevant and important to stakeholders, which was determined by:

- **Relevance:** the percentage of survey participants who have experienced this outcome or think they would experience the outcome.
- **Importance:** the percentage of survey participants who think this outcome is important.

For Project Jua, it is assumed that if short- and medium-term outcomes are material, then the long-term outcomes they linked to would be material. Material long-term outcomes were thus valued in monetary terms. To avoid double calculating the value, the analysis does not value short- and medium-term outcomes separately because they are interlinked and contribute to the long-term outcomes (an assured SROI report also used this method<sup>9</sup>). Financial proxies for the changes are identified based on desk-based research and consultation with the project delivery team. USD is used during the valuation as most of the referenced data points use USD in their research or assessment. The final value is converted to GBP using the average exchange rate of USD to GBP in 2020, i.e., 1 to 0.7798<sup>10</sup>.

For Future Builders, the study values all medium and long-term outcomes that were identified as material for stakeholders. The risk of double counting can be mitigated as outcome data have been monitored and collected as young people progress in the programme; that is, it is possible to establish the exact number of young people who have experienced the changes. Only one outcome is valued based on an estimation of young people experiencing the change, but it is believed that the estimation is still solid as it was calculated according to the consultation with young people.

For OVO Gives Back, all material short- and medium-term outcomes are valued, with a belief that if they are fulfilled, the broader, long-term outcomes would be achieved. To avoid double counting, the study does not value long-term outcomes.

## Stage 6: Establishing impact and adjusting the values

To avoid over-claiming the values, stakeholders' perceptions were factored to deduct the values, in four ways:

Table 6 Deductions in value

Consideration	Questions and options in the survey
<b>Deadweight</b> – the amount of outcome that would have	What changes have you seen or experienced, (or do you think you will), because of [the programme's name]? <ul style="list-style-type: none"><li>● I have seen this</li></ul>

<sup>9</sup> [A Social Return on Investment Analysis on the Impact of DIAL House.](#)

<sup>10</sup> Exchange Gate (2020). [US Dollar to British Pound Spot Exchange Rates for 2020.](#)

Consideration	Questions and options in the survey
happened even if the activity had not taken place.	<ul style="list-style-type: none"> <li>● I think I will see this happen</li> <li>● This would have happened anyway</li> <li>● It didn't happen and/or will not happen</li> </ul> <p>The data was used to estimate the likelihood that stakeholders would experience the outcomes even without Project Jua.</p>
<b>Attribution</b> – the amount of outcome that was caused by the contribution of other organisations or people.	<p>Did anyone/anything else contribute to the experience/change?</p> <p>The data was used to determine how much change was contributed by the programmes.</p>
<b>Displacement</b> – the amount of outcome displaced by other outcomes.	<p>Have all the changes been positive? If not, what have been the negative changes?</p> <p>The data was used to decide whether intended outcomes bring other negative outcomes.</p>
<b>Drop off and duration</b> – the length an outcome would last.	<p>How long did the change last for (or do you think the change will last)?</p> <ul style="list-style-type: none"> <li>● 3 months</li> <li>● 6 months</li> <li>● 1 year</li> <li>● 2 years</li> <li>● over 2 years</li> </ul> <p>The data was used to estimate how long outcomes would last and when outcome would reduce.</p>

### Stage 7: Calculating SROI with sensitivity analysis

The benefits were added up and subtracted by negatives to estimate the values generated by each programme. Sensitivity analysis was conducted through using different financial figures and adjusting deductions, in order to see how different scenarios could impact the outcomes.

### Stage 8: Reporting, verification and recommendations

#### Project Jua

Findings were presented in this report and shared with stakeholders. OVO Foundation and Energy4Impact were invited to review the full report and shared comments for revisions.

As for the verification with the wider stakeholders, during the consultation with Energy4Impact, some challenges were identified to conduct verification with teachers and health professionals, such as the lack of digital devices, limited access to internet and ability to comprehend the concepts of SROI. To overcome these challenges, suitable approaches were agreed and implemented with the support of Energy4Impact:

1. The evaluator prepared infographics to simplify the SROI analysis and findings in a way that is accessible and understandable for the teachers and health professionals,

such as converting the value to Kenyan shilling and presenting the information related to local activities.

2. The consultation prioritised the teachers and health professionals who have access to smartphones and internet. Infographics were shared with the teachers and health professionals via Whatsapp. 17 schools and 9 clinics were invited to comment, during a two-week consultation period.
3. Energy4Impact's delivery team supported the consultation with teachers and health professionals and helped interpret the information in local languages to make the process more accessible to the participants.
4. 4 schools and 5 clinics provided feedback in the end.

The teachers and health professionals showed confidence in the SROI analysis, as in the quotes below:

- *"Thanks for that partnership its realistic we benefiting." – Ngambenyi primary*
- *"Thank you Team project Jua the information is true and factual." – Kajungunyi secondary*
- *"Your findings are true and absolute." – Salim Mvurya Secondary*
- *"On behalf of the student's teachers and community, the findings are realistic." – Chinyume primary*
- *"Energy for impact has saved clinics from payment of huge electricity bill from the unreliable national grid." – Mwashuma dispensary*
- *"The findings are real and accurate I agree with them, thanks" – Manoa dispensary*
- *"True-realistic". – Mwanda dispensary*
- *"Yeah very correct". – Chilodi dispensary*
- *"The findings are accurate to the best of my understanding". – Mabesheni dispensary*

### **Future Builders**

To verify the valuation, OVO Foundation shared their feedback by reviewing this report. To consult the programme delivery teams and the young people, the study conducted the following steps:

1. The evaluator prepared infographics to simplify the SROI analysis and findings in a way that is accessible and understandable for young people, such as illustrating the concept of SROI and highlighting the monetary valuation used. The infographics are included in the appendices.
2. OVO Foundation helped share the infographics with the programme delivery teams in four cities to seek feedback from them and the young people.
3. The programme delivery teams commented on the analysis by reading the infographics.
4. The programme delivery teams supported the consultation with young people and helped explain the logic of valuation.
5. Three programme delivery teams provided feedback in the end, with one not giving their individual feedback but sharing the thoughts from seven young people they supported.

The verification resulted in different views on the analysis, as outlined below, including how these considerations are incorporated in this study.

Stakeholders	Comments
Young people	<p>7 people were consulted and all of them agreed with the analysis. Quoting the summary from the delivery partner: <i>“5 young people needed me to explain the slide but once I explained it to them they all thought it was amazing and not what they would expect to save by taking part in the course. 2 young people thought it was really clear and thought the layout was excellent.”</i> Young people also restate the importance of some outcomes, such as the saving of rent, <i>“I love the fact that I can save money from my flat”</i> as well as the benefits to the community, <i>“This is fantastic when you see it like this you can see how the course will benefit not only me but also the community”</i>.</p>
Charity partners	<p>Charity partners shared their views about the valuation of outcomes, as summarised below.</p> <p><b>About “Young people can save money while maintaining tenancy”:</b> Two charity partners believed that the money saved through rent was underestimated, as 1625ip (in Bristol) commented, <i>“as market rents are about £330 a month higher”</i>; and The Benjamin Foundation (in Norfolk) stated, <i>“Looking at the cost of privately renting a one bedroom property in North Walsham, this project saves each young person who lives there around £2,700 per annum and that’s just in rent. What it doesn’t take into account is that the rent we charge covers council tax, electricity, water, broadband etc so it is there only housing-related outgoing. If you were to factor this in, the savings would be significantly higher.”</i></p> <p>The value used in the study was calculated by considering the Local Housing Allowance (LHA) in four cities during March 2019 to April 2020 (see more details in <a href="#">this section</a>). In Bristol, LHA is £85.95 per week, which means £343.68 per month. This value was similar to what the delivery partner suggested about market rents at around £330. The LHA in Norfolk is £74.79 per week (or £3,889.08 per year), which is already higher than the £2,700 per annum suggested by the charity partner. The fact that the savings perceived by the partners was higher could be because the study calculated rent saving by deducting the rent paid by young people to charity partners from the LHA they were otherwise likely to pay. As the figure of LHA was provided by the government and the rent paid was provided by the charity partners, the study concluded that both figures were fact-based and thus kept the current value used.</p> <p><b>About “Young people feel supported living in affordable housing”:</b> A charity partner questioned the value refurbished properties could bring, as they believed their <i>“gross rental income is more than this”</i>. The value used was calculated based on the rent generated from per person per</p>

year, as reported by the charity partners. The number of people in the scope was those who lived in the houses refurbished in 2019-2020. The charity partner might have considered the wider houses refurbished; thus a higher rental income was calculated. The study decided to keep the current value used in light of the scope of this evaluation.

**About “Young people move on to positive accommodation pathway”:**

A charity partner stressed the difficulty to value this outcome, *“It’s difficult to put a financial value on the sense of ‘being able to pay for housing’. We’re in no doubt about the value the project adds to the young people in social terms but wouldn’t know where to begin putting a financial value on it. I suppose if you consider the cost of a year’s worth of housing in the private rental sector then £7,347 would seem about right, maybe even a little underestimated.”* The value used in the study was based on research (see [this section](#) for details), which was believed to be credible. The study thus decided to use this value as it was, but it is suggested that future studies could conduct value games with young people to establish a value from their perspectives.

**About “Young people sustain employment”:**

Although The Benjamin Foundation (in Norfolk) thought *“in terms of what the young people could be earning if employed, we’d agree the figure quoted was reasonable for Norfolk”*, 1625ip (in Bristol) thought the figure was a little high, as they believed young people could earn around £12,900 a year considering minimum wage. Minimum wage was used in the calculation for this outcome, though resulting in a higher figure at £14,650.06. The charity partner also mentioned, *“Many of our residents are struggling to get full time hours also. Apprentices will earn around £10k annually.”* The study thus tested the value for this outcome in the sensitivity analysis.

**About “Young people grow and sustain their wellbeing”:**

A charity partner believed that this outcome was priceless for young people. In order to value it as a part of SROI, the value used in this study was based on credible research (see [this section](#) for details), while it is understandable that some outcomes could be harder to be assigned a monetary value. In addition to literature review, it is suggested that future studies could conduct value games with young people to establish a value from their perspectives.

**About other outcomes:**

A charity partner suggested a potential long-term outcome not in the study, *“Having affordable housing means that many of our residents don’t have to drop out of post 16 education and can complete Level 3*

	<p><i>qualifications or continue to university. This increases earning potential for the future.”</i> The study did not include this outcome, as charity partners were involved when the Theory of Change was being refined and this potential outcome was not suggested at that time, so the study could not test the materiality of this outcome at this stage of evaluation. It is suggested that future study consider this outcome and engage with stakeholders to validate its materiality.</p>
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### **OVO Gives Back**

To verify the valuation, OVO Foundation shared their feedback by reviewing this report. To consult OVO staff members and charity partners, the study conducted the following steps:

1. The evaluator prepared two sets of infographics, one for staff members and the other for charity partners, to simplify the SROI analysis and findings in a way that is accessible and understandable, such as illustrating the concept of SROI and highlighting the monetary valuation used. The infographics are included in the appendices.
2. OVO Foundation helped share the infographics with all the OVO staff members who have participated in the survey and all charity partners to seek feedback.
3. One staff member and two charity partners provided feedback in the end.

A staff member asked for clarification on the calculation of volunteering hours and donations, which is presented in this report. The two charity partners agreed with valuation in general, sharing *“It all looks great”* and *“The results are quite impressive. I could see how they would/could work”*.

In terms of the outcome *“Charities meet their anticipated outcomes because of the help of OVO volunteers”*, a charity partner noted that they operated on a 100% volunteering basis, so *“it is difficult to make any judgements on the financial aspects”*, but they also shared that the saved costs could be the contribution to the council or the city.

As for the outcome *“Charities meet their anticipated outcomes because of OVO’s grant funding”*, a charity partner clarified the process for them to apply for OVO’s grants, *“The application form itself was really simple, which was very much appreciated. However some additional work goes into the bid beforehand, collaborating with project teams to identify the biggest needs, brainstorming ways that OVO team members can volunteer, working with Finance to finalise budgets etc. Overall I’d say the application process takes closer to a day. We have to do this sort of preparatory work for the majority of grant applications, so I appreciate if you are not including it as it is seen as standard.”* As two hours was used in the study, additional time was considered in the sensitivity analysis.

### **Limitations of the study**

There are some limitations of this evaluation that could influence the result of SROI. The evaluator has tried to mitigate the risks of limitations, yet where not possible, limitations are considered in the sensitivity analysis to predict results in different scenarios.

Recommendations for future studies are presented in [this section](#).

**Difficulties to engage directly with some stakeholders:** Due to COVID restrictions and resource constraints, the evaluator was not able to collect data directly with some stakeholders (i.e., teachers, students, health professionals and patients at Project Jua; young people taking part in Future Builders) but relied on the support of the programme delivery teams. The COVID restrictions have made it challenging for the evaluator of this project to directly speak to stakeholders in person. Additional language support and explanation are also required to ensure stakeholders understand the content of the survey, as even though the stakeholders could speak English, it still requires the support of local languages or additional explanation to supplement their level of English proficiency or the knowledge required to understand SROI research. Thus, the data collection in this study relied on the support of the programme delivery teams. The reliance may have resulted in stakeholders feeling a need to provide positive feedback in the presence of the delivery teams. In addition, there was no additional budget to compensate for stakeholders' involvement in the study, which made it not possible to engage stakeholders widely and deeply. Considering these challenges, in Project Jua, the study used surveys to gain the perspectives of teachers and health professionals on the outcomes and previous interview videos to infer children's viewpoints. As for Future Builders, the study used surveys to collect viewpoints from young people, with the programme delivery teams filling in the paper surveys. Direct conversations with the stakeholders might benefit the process in honing the definition of outcomes. It is suggested that future study prioritises direct engagement with the stakeholders from the very beginning of the process, and that appropriate budget and time are built in to support their engagement.

**Selection and sampling bias:** The study was not able to engage with all stakeholders in each group, which could result in bias in opinions. In the three programmes, it was voluntary for invited participants to join the workshop and fill in the surveys. The Project Jua surveys were conducted onsite by the delivery partners through random sampling, while the Future Builders surveys were completed either to all the young people living in Future Builder homes or through random sampling by the delivery partners. The approach of random sampling was chosen to enhance accessibility and take into account the availability of participants; however, it means there could be potential bias in the analysis. The study adjusts the outcome data in the sensitivity analysis.

**Selection of proxy data:** While the study uses relevant financial proxies for the outcomes, the choice of proxies would influence the final valuation. The risks in selection of proxies include: (1) Some proxies may not fully reflect the context of the interventions (such as rural parts of Kenya, although the quoted reports were conducted in similar contexts, such as low-to middle-income countries); (2) There are not yet standardised values or it is tricky to value some outcomes. In addition, some prices could fluctuate or should be adjusted due to country context, such as carbon pricing. To mitigate the risks, the study considers the above factors in the sensitivity analysis.

**Use of assumptions:** In the analysis of Project Jua, the study has access to its needs assessment report, which provides rich baseline data. However, while some data have been tracked automatically by the systems introduced to the implementation sites (such as energy

monitoring system), one few data points were analysed. This resulted in the lack of endline outcome data. As for OVO Gives Back, many quantities are estimated based on the views of survey participants, rather than the actual number experiencing the changes. Although this approach is not ideal, it was not possible to involve all stakeholders, due to the reasons described above. The study thus makes assumptions in some value calculation and intends to mitigate risks of overclaiming by using context-specific or adjusted research and data.

**Potential differences in outcomes:** As mentioned in the previous point, sampling limitation could lead to some bias in opinions. This is especially the case for Project Jua, as for example, an outcome is related to gender differences, while current data collected was not possible to differentiate the experiences of students. In Project Jua, among all the survey participants, only one teacher reported seeing no changes in one outcome, while all health professionals reported seeing changes in all outcomes. Even though the study collected the geographic location of the teachers and the health professionals, it is difficult to disaggregate current data and define patterns for differences in outcomes. For future studies, it is suggested not only to expand the scale of the sample, but also to collect more types of demographic data in order to identify patterns. The study identified subgroups for stakeholders, yet some subgroups could be further segmented based on their characteristics such as gender, age and socio-economic backgrounds. While the study was not able to collect a range of demographic data from its evaluation participants, coupled with the potential sampling bias, the gap leads to the challenges of identifying patterns of participants and informing their potential different perception in outcomes. In addition, due to the limitation of resources, the study was not able to reconvene participants who experienced different extent of outcomes, to identify the potential reasons. Despite the above limitations, the majority of (and sometimes all) the evaluation participants reported experiencing the outcomes. For those who experienced different outcomes from the others, it might be worth exploring the following questions in future studies: (1) For the stakeholders that did not report seeing positive outcomes yet, do they share any characteristics and what could be the reasons that their experiences were different from others? (2) Do the people who reported experiencing unexpected negative outcomes share any characteristics and why have they experienced negative outcomes? The study thus makes recommendations in [this section](#) for the programme to continue collecting data and monitoring the achievement of the outcomes.

# Project Jua

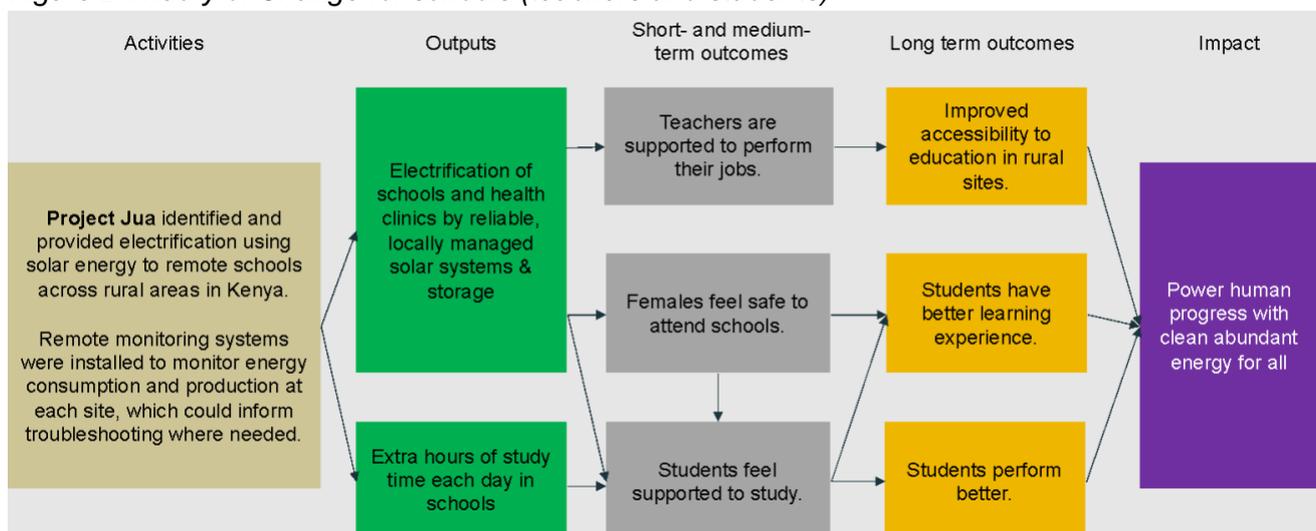
## Outcomes and values

### Outcomes for schools

#### Theory of Change for schools

To achieve the education outcomes, the roles of teachers and students are interlinked. The relationships between activities and outcomes are presented below. The chain of events was created based on the consultation with Energy4Impact project management team and partnered researchers in a workshop, the qualitative feedback from the teachers in the surveys, the informal conversation between the onsite project team members and the teachers, the video interviews with students, the judgement of the evaluator and further validation with the project delivery team when the impact map was created.

Figure 2 Theory of Change for schools (teachers and students)



#### Material outcomes for schools

Teachers were asked to share their experience of the outcomes, as in Table 7. The participants show consensus on their experience of most of the outcomes, with majority of the feedback being “I have seen this” or “I think I will see this happen”, which indicates the relevance of these outcomes to stakeholders. There also seems to be less concern of deadweight for outcome 1-5, as no participants believe the outcomes “would have happened anyway”, although the opinions of the participants could not be generalised as those of all the other teachers. The only outcome getting varied views is “local businesses generate more income”, with only 12% of participants having seen this, 76% gauging it will happen, 6% believing it would have happened anyway and another 6% doubting it would ever happen.

Based on the teachers’ actual experience of the outcomes, the final column of Table 7 shows a “relevance judgement” to summarise whether the outcome is relevant to the stakeholders

Table 7 Teachers' experience of the outcomes (N=49)

Outcomes	I have seen this	I think I will see this happen	This would have happened anyway	It didn't happen and/or will not happen	relevance judgement
1. I feel supported to do my job.	100%	0%	0%	0%	relevant
2. More children and young people attend schools.	73%	27%	0%	0%	relevant
3. More girls attend schools.	71%	27%	0%	2%	relevant
4. Students attend schools more often.	90%	10%	0%	0%	relevant
5. Students perform better.	78%	22%	0%	0%	relevant
6. Local businesses generate more income.	12%	76%	6%	6%	partially relevant
7. My communities become more sustainable.	71%	27%	2%	0%	relevant

Teachers were also invited to rate the importance of each outcome. Outcomes 1-5 are identified as important as over 95% of participants believed they are quite or very important. Outcome 7 (“my communities become more sustainable”), albeit attracting varied views, still showed importance among 83% of the participants. Outcome 6 (“local businesses generate more income”), however, was believed to be important by only 51% of the participants and most of them (33%) held neutral opinions (i.e., so-so) about this outcome. While still over half of the participants thought Outcome 6 was of importance, the percentage was much lower than that of the other outcomes. It was then defined as “not important” in the last column “importance judgement”.

*Table 8 Teachers' rating of importance of the outcomes (N=49)*

Outcomes	not important	less important	so-so	quite important	very important	importance judgement
1. I feel supported to do my job.	0%	0%	0%	14%	86%	important
2. More children and young people attend schools.	0%	0%	0%	27%	73%	important
3. More girls attend schools.	0%	0%	2%	29%	69%	important

4. Students attend schools more often.	0%	0%	2%	27%	71%	important
5. Students perform better.	0%	0%	2%	20%	78%	important
6. Local businesses generate more income.	4%	12%	33%	27%	24%	not important
7. My communities become more sustainable.	2%	4%	10%	24%	59%	important

Most outcomes were proved to be material to teachers, as they are both relevant and important, except for Outcome 6, which was defined as “partially relevant” and “not important. In consultation with Energy4Impact, it was clarified that schools are regulated by law not being able to pursue other income generation activities, which may be a reason why teachers did not agree on the importance of this outcome. Outcome 6 was then not considered in the Theory of Change for schools.

Finally, the chain of change was also discussed with the teachers when administering the surveys informally, to define how short- and medium-term outcomes could link to long-term outcomes.

## Valuation of outcomes for schools

### Outcome: Improved accessibility to education in rural sites.

Before Project Jua, 68% of the schools had a source of power (from national grid or PV system), though 73% of schools rarely or never have available power. The remaining 32% of schools have no sources of power at all<sup>11</sup>. Due to the lack of electricity, lots of appliances were not useable, such as lightbulbs, projectors, tablets and laptops, as found in the needs assessment. Students also echo this in the interviews:

- *“We are unable to use the computers, laptops, and the electronic devices, not at school right now because we don't have them in our school. The reason why we don't have them in our school it's because we lack power.” – Secondary 1*

With electricity at schools, teachers are supported to save their time commuting between schools and sites with electricity and focus on educating students with powered learning equipment. This can be demonstrated by teachers' feedback:

- *“Documents are also typed and printed in the institution reducing movement of staff members.” – Teacher 1*
- *“All typing and printing activities done in school reducing movement of staff members to the cyber cafes.” – Teacher 5*
- *“Electrical based services are now available in the institution reducing movement and transport cost of staff members looking for such services.” – Teacher 6*

<sup>11</sup> From Project Jua needs assessment (December 2019).

To value this outcome, two indicators informed from the workshop and survey are used:

- **Saved costs from paying unreliable grid energy by schools:** The project’s needs assessment shows that 36% of schools (90 schools) have no energy budget, 63% of schools (159 schools) have a monthly energy budget over USD 50, and 1 school has a budget of USD 45. This analysis thus estimated that the annual budget for all schools combined is USD 95,940. As the financial proxy is calculated as a combined number for all schools, the quantity for this indicator uses a percentage, meaning the percentage of schools that have been paying for unreliable energy. 73% of schools have unreliable energy and 100% of teachers believed they are more supported due to Project Jua, thus 73% is used with no deduction. Sensitivity analysis will be considered in the sections later.
- **Time saved commuting between schools and electrified sites:** based on the data from Project Jua needs assessment, it is estimated that there are around 1,825 teachers at all schools. It is assumed that they spent around 4 hour per month (once a week; an hour each time) commuting between schools and sites with electricity, which means all teachers spend 87,600 hours commuting for electricity. It is calculated that the average hourly salary of primary school teachers in Kenya is USD 1.5, based on their average annual salary of USD 1,908 (KSh 205,873<sup>12</sup>) and 7.5 hours of work each school day.

With the calculation in Table 9, the value estimated for this outcome is USD 457,848.70.

*Table 9 Valuing "Improved accessibility to education in rural sites"*

Indicator	Quantity	Financial proxy	Value in currency	Source of value
Saved costs from paying unreliable grid energy by schools	73%	USD 95,940 – annual costs of current energy sources at schools	USD 64,406.47	Project Jua needs assessment
Hours saved commuting between schools and electrified sites	87,600	USD 1.5 – teachers’ hourly rate	USD 120,837.65	<a href="#">Pay scale</a>

*\*The value shown is after the reduction of deadweight, displacement, attribution and drop-off.*

### **Outcome: Students have better learning experience.**

There are three short- and medium-term outcomes related to students that contribute to this long-term outcome. Firstly, most (73%) of the teachers have seen “more children and young people attend schools” and the rest believe this will happen. Attendance data were collected in Project Jua needs assessment, while latest data will be collected again in late 2021 to verify the changes in attendance.

<sup>12</sup> Pay scale. [Average Primary School Teacher Salary in Kenya.](#)

Second, survey results also evidence that “more females attend school” due to increased safety from extra lighting. The majority (71%) of teachers observed that there are more females attending schools and 27% think this will happen. Three teachers also state improved night security as an additional outcome. A girl at a secondary school shared the frustration of not being able to study at night:

- *“Normally we study in school during the day and during the night really want to study but because of lack of light. We only have two kerosene lamps and a torch, so we have a great challenge of studying during the night.” – Secondary 1*

Other primary and secondary school students also enjoyed the benefits of solar panels for extra study:

- *“Solar panels cause a difference because we’ll be able to study during the night and we’ll be able to extend the time for revising and revising for exams. And will be also able to study during the morning preps.” – Secondary 2*
- *“Due to lack of electricity, we are not able to study after dark.” – Primary 1*

Third relevant outcome, the frequency for students attending schools, was also enhanced. 90% of the surveyed teachers agreed that “students attend school more often”, while 10% believed this would happen in the future.

The fact that “Students have better learning experience” may also contribute to the change of another long-term outcome, “Students perform better”. The study had considered to use indicators such as increased student attendance or improved school performance, though the outcome data for such indicators would not be available until the end of the project (i.e., end of 2021).

Considering the lack of outcome data, and to avoid double counting the value, the long-term outcome is then valued by the time freed up for family members to pursue other activities, an indicator identified in the workshop with the project delivery team. Official school hour ends at 3:30 pm in Kenya<sup>13</sup>. With light for early morning and night study, students would be able to study at school for extra hours. Assuming they study 2 hours every day for 170 school days a year, they would study 340 hours at school, which also means each family member have extra 340 hours to pursue other activities. As there are 86,226 students in total<sup>14</sup>, it is then estimated that there are around 31,936 family whose children may study at local schools, based on an average of 2.7 children in each household in the five counties<sup>15</sup>.

If students could study 2 more hours in a school day, 10,858,088 hours could be saved for all 31,936 families in a year (assuming only one person in each family needs to take care of or spend those 2 hours with the student). However, as not all survey participants think this outcome have happened yet (as in Table 7), to avoid overclaiming, the total hours are thus discounted by the average percentage (78%) of participants who have seen the relevant short- and medium outcomes happened, resulting in 8,469,309 hours.

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<sup>13</sup> News Pro (2019). [Professor Maqoha Reveals official school hours for learners.](#)

<sup>14</sup> Project Jua needs assessment.

<sup>15</sup> Kenya National Bureau of Statistics (2019). [Kenya Census 2019 Population by County and Sub-County.](#)

Table 10 Overclaim considerations

Long-term outcome	Related short- and medium-term outcome (original languages)	% of participants who have seen this happen
Students have better learning experience.	More children and young people attend schools.	73%
	More girls attend schools.	71%
	Students attend schools more often.	90%
Average		78%

The financial proxy chosen is the willingness-to-accept value of leisure time at EUR 16<sup>16</sup>. As this research was conducted by surveying people in the Netherlands in 2018, it is necessary to adjust the figure to reflect the context in Kenya, as calculated in Table 11. The adjusted willingness-to-accept value of leisure time in Kenya is KSh 35.33, converted to 0.35 USD for consistency in calculation.

Table 11 Adjustment of willingness-to-accept value of leisure time

Consideration	Adjustment in 2018	Value
Willingness-to-accept value of leisure time in Netherlands	N/A	EUR 16
Currency rate (EUR to KSh)	1:115.25 <sup>17</sup>	KSh 1844.08
PPP conversion factors	Kenya = 40.19 <sup>18</sup> Netherlands = 0.77 <sup>19</sup>	52.2 times
Willingness-to-accept value of leisure time in Kenya	N/A	KSh 35.33

Table 12 Valuing "Higher rates of school attendance in remote parts of Kenya"

Indicator	Quantity	Financial proxy	Value in currency	Source of value
Time freed up for family members to pursue other activities (in hours)	8,469,309	USD 0.35 – the willingness-to-accept value of leisure time in Kenya	USD 1,868,600.80	<a href="#">Time Is Money: Investigating the Value of Leisure Time and Unpaid Work</a>

\*The value shown is after the reduction of deadweight, displacement, attribution and drop-off.

## Outcome: Students perform better.

<sup>16</sup> Kaya Verbooy MSc; Renske Hoefman PhD; Job van Exel; Werner Brouwer. 2018. [Time Is Money: Investigating the Value of Leisure Time and Unpaid Work](#). Value in Health. Volume 21, Issue 12, December 2018, Pages 1428-1436.

<sup>17</sup> [The Euro to Kenyan Shilling Historical Exchange Rates Conversion Page for 2018](#).

<sup>18</sup> World Bank (2018). [PPP conversion factor, GDP \(LCU per international \\$\) – Kenya](#).

<sup>19</sup> World Bank (2018). [PPP conversion factor, GDP \(LCU per international \\$\) – Netherlands](#).

All teachers believed that they have seen or will see “students perform better”. From the video recorded interviews, students also shared the benefits of solar panels, which enabled them to extend study hours and use electronic devices at schools:

- *“Having the solar panels in our school will help us a great deal, because we will extend the studying hours in our school, and also as a school we will be able to purchase electronic devices such as computers, and also printers and that would be really great.” – Secondary 1*
- *“We will be able to acquire those electronic devices like laptops and computers.” – Secondary 2*
- *“When we have solar panels, we will be able to study after dark, use computers, tablets, laptops and other equipment.” – Primary 1*
- *“Due to lack of electricity, we are not able to study after dark, not able to use tablets, computers or laptops for the moment due to lack of power. We are going to be able to use laptops, computers and other equipment.” – Primary 2*

The indicator chosen for improved student performance is the investment in installing cable infrastructure at schools. Data showed that total investment at all sites (including 230 schools and 31 clinics) were GBP 76,865.15<sup>20</sup>, while the amount dedicated to schools was not clear. This analysis then proportionally applies 88.12% to schools (230 out of all 261 sites), meaning GBP 67,735.57 was invested in schools cable infrastructure.

Costs are then proportionally applied to primary and secondary schools, with a further allocation to boy and girls, assuming both genders enjoy the benefits resulting from cable infrastructure. As the precise percentage of boys and girls is not clear for primary and secondary schools, the gender percentage of all students are used; that is, 51.8% (44,663 out of all 86,226) are male and 48.2% (41,563 out of all 86,226) are female. To avoid overclaiming, the estimated investment allocated is further discounted by outcome experience, as only 78% of teachers have seen this outcome happen (Table 7). The figures in Table 13 are then converted from GBP to USD in Table 14 for consistency in calculation.

*Table 13 Investment in school's cable infrastructure, by gender*

Type of schools	% of schools	Est. Allocated investment	Boys/girls	Est. Allocated investment	Investment after discounted (78%)
Primary	93%	GBP 62994.08	51.8%	GBP 32629.42	GBP 25,450.95
			48.2%	GBP 30364.66	GBP 23,684.43
Secondary	7%	GBP 4741.49	51.8%	GBP 32629.42	GBP 25,450.95
			48.2%	GBP 30364.66	GBP 23,684.43

Financial proxy chosen is the return of investment in primary or secondary education in middle-income countries, which are defined by a study<sup>21</sup> using World Bank’s classification of countries with a GNI per capita at the range of USD 1046-12,735 in 2015 when Kenya’s GNI

<sup>20</sup> Energy4Impact. Implementation Phase Report- PROJECT JUA: May 2019 - December 2020.

<sup>21</sup> “Psacharopoulos, George; Patrinos, Harry Anthony. 2018. [Returns to Investment in Education: A Decennial Review of the Global Literature](#). Policy Research Working Paper; No. 8402. World Bank.

per capita was USD 1,290. In that study, apart from the direct investment in education and direct benefits of education, the estimation of return rate also considered the full resource cost of investment and social benefits of education. This consideration is applicable in the context of Project Jua, as electricity can be regarded as an enabler of education in rural parts of Kenya and education could bring other social benefits to children. Research shows that the returns of investment related to education are different for primary schools and secondary schools and that investment to girls has 2% more on its return in general.

Table 14 Valuing "Students perform better"

Indicator	Quantity	Financial proxy	Value in currency	Source of value
Investment in electrifying the classrooms in primary schools (USD) – boys	19,846.6 5	17.1% return from investment in primary education in middle-income countries for boys	USD 14,867.68	Returns to Investment in Education: A Decennial Review of the Global Literature <sup>22</sup>
Investment in electrifying the classrooms in primary schools (USD) – girls	18,469.1 2	19.1% return from investment in primary education in middle-income countries for girls	USD 14,072.04	
Investment in electrifying the classrooms in secondary schools (USD) – boys	19,846.6 5	12.8% return from investment in secondary education in middle-income countries	USD 14,321.73	
Investment in electrifying the classrooms in primary schools (USD) – girls	18,469.1 2	14.8% return from investment in secondary education in middle-income countries for girls	USD 13,563.98	

\*The value shown is after the reduction of deadweight, displacement, attribution and drop-off.

## Outcomes for clinics

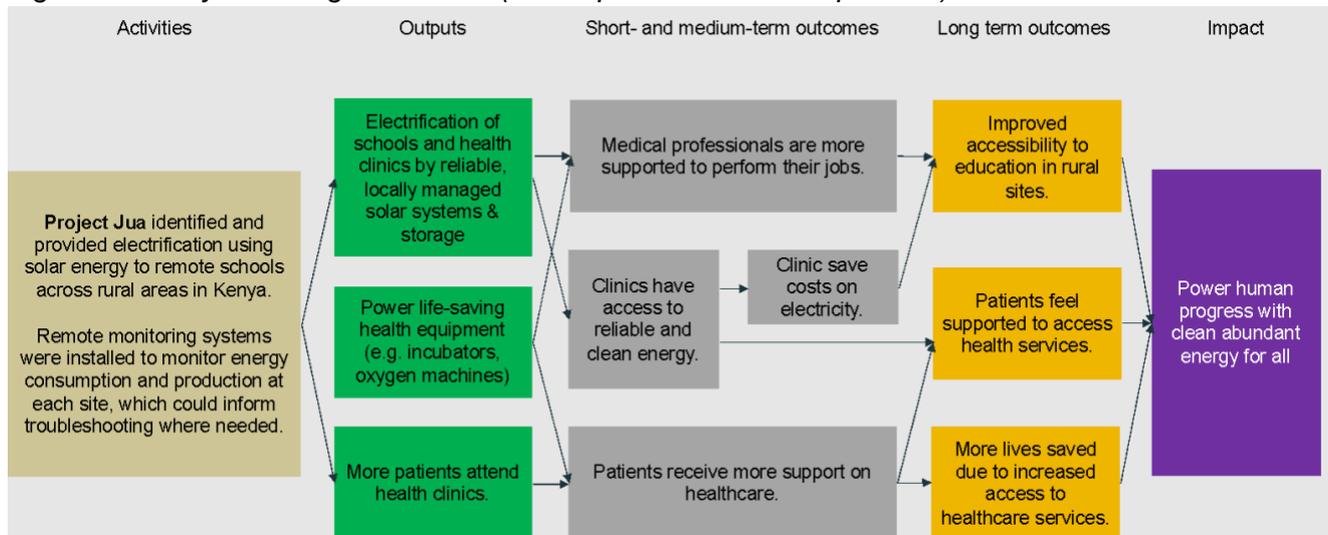
### Theory of Change for clinics

To achieve health outcomes, the roles of health professionals and patients are interlinked. The relationships between activities and outcomes are presented below. The chain of events was defined by consulting with Energy4Impact project management team and partnered researchers in a workshop, receiving the qualitative feedback from the health professionals in the surveys, learning from the informal conversation between the onsite project team members and the health professionals, reviewing the video interviews with the health

<sup>22</sup> "Psacharopoulos, George; Patrinos, Harry Anthony. 2018. [Returns to Investment in Education: A Decennial Review of the Global Literature](#). Policy Research Working Paper; No. 8402. World Bank.

professionals, using the judgement of the evaluator and further validating with the project delivery team when the impact map was created.

Figure 3 Theory of Change for clinics (health professionals and patients)



### Material outcomes for clinics

Health professionals at local clinics were surveyed to share their experience with the changes. Overall, almost all outcomes have at least 75% of the health professionals seeing them happen. There are four outcomes that have been experienced by all survey participants: outcome 1, 4, 5 and 6 in Table 15. Outcome 7 shows slightly varied opinions among health professionals. While the majority (75%) believe it has happened and 17% think this will happen, there are 8% of participants think this would have happened even without Project Jua, for which the study will consider in the deadweight calculation. The only outcome that has not been observed widely (only 17%) is Outcome 8 “Local businesses generate more income” and 8% thought this would have happened anyway, although 75% of participants think it will happen in the future. It is defined as “partially relevant” in this study, as the average percentage of “I have seen this” for all outcomes is 84%, a lot higher than the 17% for Outcome 8.

Table 15 shows the surveyed results from health professionals. The final column summarizes the relevance of its corresponding outcome to clinics.

Table 15 Health professionals' experience of the outcomes (N=12)

Outcomes	I have seen this	I think I will see this happen	This would have happened anyway	It didn't happen and/or will not happen	relevance judgement
1. I feel supported to do my job.	100%	0%	0%	0%	relevant
2. More patients attend health clinics.	83%	17%	0%	0%	relevant

3. Patients receive more support on healthcare.	92%	8%	0%	0%	relevant
4. More lives are saved.	100%	0%	0%	0%	relevant
5. The clinic has access to reliable and clean energy.	100%	0%	0%	0%	relevant
6. The clinic saves costs on electricity.	100%	0%	0%	0%	relevant
7. Life-saving health equipment can be powered.	75%	17%	8%	0%	relevant
8. Local businesses generate more income.	17%	75%	8%	0%	partially relevant
9. My communities become more sustainable.	92%	8%	0%	0%	relevant

With the same set of outcomes, health professionals rated their importance. On average, outcomes received 77% of participants who rate them as very important. Therefore, we have classified the outcomes that have above 77% “very important” rating as “important” in the judgement column. Outcome 2 and 9, though slightly below the average, are still identified as important, as respectively over 92% and 100% of participants think they are very important and quite important. Outcome 8, however, has just over 40% of participants think it is very important, 33% for so-so, and even 8% for not important. It is thus coded as “partially important” in the judgement column.

*Table 16 Health professionals' rating of importance of the outcomes (N=12)*

Outcomes	not important	less important	so-so	quite important	very important	importance judgement
1. I feel supported to do my job.	0%	0%	0%	8%	92%	important
2. More patients attend health clinics.	0%	0%	8%	25%	67%	important
3. Patients receive more support on healthcare.	0%	0%	0%	17%	83%	important
4. More lives are saved.	0%	0%	0%	17%	83%	important
5. The clinic has access to reliable and clean energy.	0%	0%	0%	17%	83%	important

6. The clinic saves costs on electricity.	0%	0%	0%	8%	92%	important
7. Life-saving health equipment can be powered.	0%	0%	9%	9%	82%	important
8. Local businesses generate more income.	8%	0%	33%	17%	42%	partially important
9. My communities become more sustainable.	0%	0%	0%	33%	67%	important

For all the outcomes that are relevant and important, they are considered material. Only Outcome 8 are dropped out from the material outcomes, as it is identified as partially relevant and partially important. The chain of events was also discussed with the health professionals when the surveys were administered informally, to define how short- and medium-term outcomes could link to long-term outcomes.

### Valuation of outcomes for clinics

#### Outcome: Improved accessibility to health in rural sites.

Before Project Jua, 56% of clinics have electricity, while 71% among them stated that electricity was either available only half of the time, rarely available or never available<sup>23</sup>. 44% of clinics had no source of power at all. Due to lack of power, clinics were not able to offer services at night and health equipment could not be properly powered. 86% of the clinics operated for 5 days a week for less than 10 hours per day.

Installed with solar PV systems, clinics can offer health services with extended hours and focused staff, as shared by health professionals:

- *“Some services could not be done before the Jua Project such as deliveries at night.” – Health professional 101*
- *“All night deliveries are served well with enough light, then movement of staff has been reduced, photocopy of official document is done in the clinic.” – Health professional 104*
- *“Deliveries have been picked up due to availability of power we have.” – Health professional 302*

To value this outcome, two indicators informed from the workshop and survey are used:

- **Saved costs of paying unreliable grid energy by clinics:** The project’s needs assessment shows that 76% of clinics (38 clinics) has no energy budget, 18% of schools (9 clinics) has a monthly energy budget below USD 50 (USD 254 in total), and the remaining 3 clinics has a budget over USD 50 (USD 412 in total). This means that before Project Jua, clinics spent USD 7,992 in total annually in energy, which is used as the financial proxy for this indicator. As the financial proxy is calculated as a

<sup>23</sup> From Project Jua needs assessment (December 2019).

sum for all clinics, the quantity for this indicator uses a percentage, meaning the proportion of clinics that have been paying for unreliable energy (71% clinics have unreliable energy). As 100% of health professionals believed they have all seen the outcomes related to this outcome, 71% is therefore used with no deduction in calculation. Sensitivity analysis will be considered in the sections later.

- **Time saved commuting between clinics and electrified sites:** Among all clinics, there are 362 medical staff in total, of which 82 are non-medical staff (1-2 per clinic). It is assumed that non-medical staff would be in charge of non-medical related activities, such as photocopy of official document. Due to Project Jua, staff can now complete these tasks in their clinics, reducing the time of commuting to sites with electricity. Assuming one non-medical staff per clinic spent around 4 hours a month (an hour a week) an hour a day commuting and that most (86%) of clinics operates 5 days a week and less than 10 hours a day<sup>24</sup>, which means all non-medical staff spend 2,400 hours commuting for electricity. The average hourly salary of non-medical staff in Kenya is calculated at USD 1.94, based on their average annual salary of USD 4575.60 (KSh 492,000<sup>25</sup>), 10 hours of work each day and 24 days of annual leave in average<sup>26</sup>.

Table 17 Valuing “Improved accessibility to health in rural sites”

Indicator	Quantity	Financial proxy	Value in currency	Source of value
Saved costs of paying unreliable grid energy by clinics	71%	USD 7,992 – annual costs of current energy sources at schools	USD 4,334.55	Project Jua needs assessment
Hours saved commuting between clinics and electrified sites	2,400	USD 1.94 – nurses’ hourly rate on average	USD 3,556.67	<a href="#">MyJobMag</a>

\*The value shown is after the reduction of deadweight, displacement, attribution and drop-off.

However, two clinics stated that current energy is not enough for certain equipment, which may influence the delivery of health services and the duration of the outcome:

- “The clinic is requesting for a powerful inverter of a greater wattage since the installed one can’t fully serve the already present machines like vaccine fridges, autoclaving machines and incubators.” – Health professional 103
- “The health clinic is requesting for a bigger system since the installed one cannot serve continuously on the vaccines fridges. The fridges get power for two hours before the batteries drain.” – Health professional 104

### Outcome: Patients feel supported to access health services.

<sup>24</sup> Project Jua needs assessment.

<sup>25</sup> MyJobMag (2020). [The Average Medical Salaries in Kenya](#). The salary of nurse is chosen as a proxy.

<sup>26</sup> AfricaPay Kenya. [Annual Leave](#).

Among the clinics supported, 42 clinics exclusively offer outpatient services and 8 offer both outpatient and inpatient services. On average, clinics offering outpatient services receive an average of 8,252 patients per month while those offering inpatient services receive an average of 12 patients per month. The number of total patients is calculated:

Table 18 Patients served by clinics

	Data from needs assessment	Data estimated by this analysis
Type of clinics	Patients served /month (all clinics)	Patients served /year (all clinics)
Outpatient	8,252	363,088
Both	12	96
Total	8,264	99,168

Assuming if a clinic can increase 2 hours of operation during its night service, potential number of patients for all clinics in a year could be 19,833 people, as in Table 19.

Table 19 Increased patients

Data from needs assessment		Data estimated by this analysis			
Patients served /month by all clinics	Clinics operation hours /month <sup>27</sup>	Patients served /hours by all clinics	Extra operation hours/day due to night service	Increased capacity each day by all clinics	Increased capacity for all clinics in a year
Outpatient – 8252	216.67	38	2	76.17	19,804
Both – 12	216.67	0.06	2	0.11	29
Total – 8,264	N/A	38.06	N/A	76.28	19,833

\*Number of patients in some cells shows decimal for clarity in figures, as it is less than one when calculated. It does not imply that it is not a whole person.

The increased supply (19,833) may be necessary, as there could be more demands of health services than the increased supply. Potential visits to doctors in the five counties in a year are estimated at 27,726,481 visits (in Table 20), which is significantly more than total patients currently served (99,168) plus increased capacity at 119,001 visits.

Table 20 Total potential doctor visits in a year in the five counties

Population in the five counties <sup>28</sup>	Average doctor visit by a person in a year <sup>29</sup>	Total potential doctor visits
3,856,256	7.19	27,726,481

To avoid overclaiming the quantity, the increased capacity is then discounted by the average of survey participants (88%) experiencing relevant short- and medium-term outcomes to this

<sup>27</sup> From Project Jua needs assessment, clinics operates 5 days a week and less than 10 hours a day.

<sup>28</sup> Kenya National Bureau of Statistics (2019). [Kenya Census 2019 Population by County and Sub-County](#).

<sup>29</sup> Statista (2018). [Number of doctor visits per capita in selected countries as of 2018](#).

long-term outcome. The discounted quantity is 17,453 patients, which is used in SROI calculation. However, several factors may influence the quantity, such as the capacity at clinics, the actual patients needing health services and their frequency of visits. The quantity will be tested in the sensitivity analysis.

The outcome is valued by considering the increased number of patients served by clinics. As all clinics are public clinics, the financial proxy used is the annual total government health expenditure per capita in Kenya. The reason is that if the patients cannot access health services properly, it would result in a waste of health expenditure from the government. Annual total government health expenditure per capita in Kenya is USD 78.6<sup>30</sup>. Assuming an international average of 7.19 times doctor visit by a person a year, it means USD 10.93 is spent by the government on a person each time they visit doctor.

Table 21 Valuing "Higher rates of clinics attendance in remote parts of Kenya"

Indicator	Quantity	Financial proxy	Value in currency	Source of value
Increased number of patients served	17,453	USD 10.93 – annual total government health expenditure per capita per visit to doctor in Kenya	USD 145,743.96	International Journal for Equity in Health <sup>31</sup> ; Health Status <sup>32</sup>

\*The value shown is after the reduction of deadweight, displacement, attribution and drop-off.

### Outcome: More lives saved due to increased access to healthcare services.

In Project Jua's needs assessment, it is found that a total of 193 patients (83 women; 90 children; 19 men) are referred by a clinic to other clinics per month. Although the reasons for referral are unclear, it could mean that patients were not able to access services or receive appropriate treatment in the clinics they originally visited. If clinics extend operation hours and the medical equipment is powered due to Project Jua, these referrals may be able to reduce to an extent. As for childbirth, a clinic has a total of 3 deliveries per month with 1 of the 3 being done at night, although night services were limited due to the lack of light. With Project Jua, clinics could offer services to more patients, which could reduce the number of patients referred to other clinics and increase the delivery of night births.

Table 22 Patient referrals by clinics

Data from needs assessment	Data estimated by this analysis
Patient referrals by all clinics in a month	Patient referrals by all clinics in a year
193	2,316

Ideally, if every patient could be served in all clinics they visit, 2,316 referrals can be reduced. This number could be covered by the increased capacity (19,833 patients)

<sup>30</sup> Kabia, E., Mbau, R., Oyando, R. et al (2019). ["We are called the et cetera": experiences of the poor with health financing reforms that target them in Kenya](#). Int J Equity Health 18, 98.

<sup>31</sup> Kabia, E., Mbau, R., Oyando, R. et al (2019). ["We are called the et cetera": experiences of the poor with health financing reforms that target them in Kenya](#). Int J Equity Health 18, 98.

<sup>32</sup> Health Status. [How Often Should You See A Doctor?](#)

calculated in the previous section. To avoid double counting, this outcome valuation focuses on child mortality, which may not be solved only by increased capacity. Although data about child mortality or severe situations for children in these clinics are not available, Table 23 shows that children account for a much higher percentage of patients referred (46.9%) comparing to patients served (28%).

Table 23 Comparison between patients served and referred<sup>33</sup>

	% of patients served	% of patients referred
Women	49%	43.2%
Men	23%	9.9%
Children	28%	46.9%

Such a difference could mean that clinics are not able to provide the appropriate health services to serve the needs of children, even if they have capacity. The issue could possibly be addressed by improvement in medical equipment, which can now be operated more effectively as a result of reliable electricity from Project Jua. The indicator used is the decreased number of children that could possibly suffer from ill health and mortality. As under-five mortality rate in Kenya is 43.2 per 1,000 live births<sup>34</sup>, it means the underserved children referrals could possibly lead to 2,425 children death (as in Table 24). With Project Jua, these children could be able to receive appropriate medical treatment and have their lives saved. To avoid overclaiming, the quantity is further discounted by the average survey participants (87.5%) that have seen relevant outcomes happen to 41 children.

Table 24 Possible under-five mortality

Data from needs assessment	Data estimated by this analysis	
Children referrals by all clinics /month	Children referrals by all clinics/ year	Possible under-five mortality (4.32%)
90	1,080	47

Financial proxy chosen is the cost of per year of healthy life saved in Kenya.

Table 25 Valuing "More lives saved due to increased access to healthcare services"

Indicator	Quantity	Financial proxy	Value in currency	Source of value
Children saved	41	USD 153 – the cost per year of healthy life saved	USD 4,373.70	London School of Hygiene & Tropical Medicine <sup>35</sup>

\*The value shown is after the reduction of deadweight, displacement, attribution and drop-off.

<sup>33</sup> Project Jua needs assessment.

<sup>34</sup> UNICEF. [Country profile – Kenya](#).

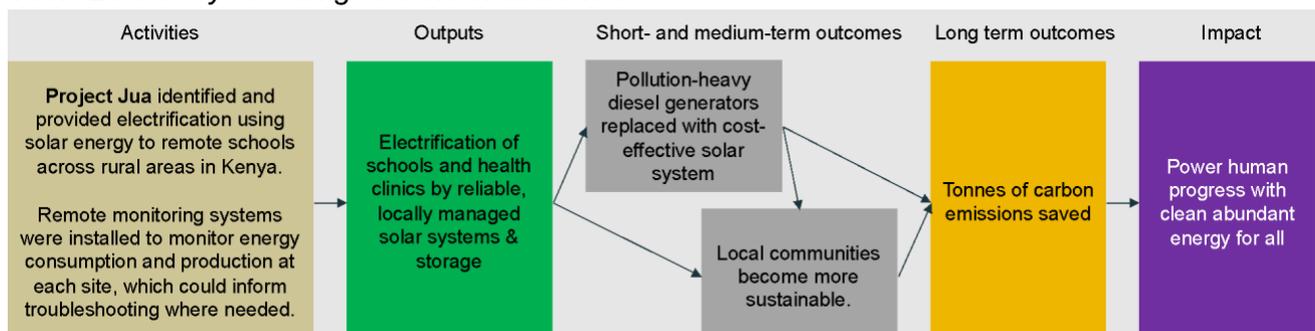
<sup>35</sup> London School of Hygiene & Tropical Medicine (2019). [Continuing pneumococcal conjugate vaccine in Kenya at full price is cost-effective and could save thousands of children's lives.](#)

## Outcomes for the environment

### Theory of Change for the environment

The environment is used as a proxy stakeholder for the future generation in the local communities. The relationships between activities and outcomes for the environment are presented below. The chain of events was identified via a workshop with Energy4Impact project management team and partnered researchers, the judgement of the evaluator and further validation with the project delivery team when the impact map was created.

Table 26 Theory of Change for the environment



### Material outcomes for the environment

Although it is not possible to consult the environment on the importance and relevance of the outcomes, the schools and the clinics in local communities have been asked to share their experience of an outcome “My communities become more sustainable”, which is identified as material (as in Table 7, Table 8, Table 15 and Table 16). The study thus decided to maintain this as a material outcome for the environment.

### Valuation of outcomes for the environment

#### Outcome: Tonnes of carbon emissions saved.

##### At schools

As solar energy was introduced, rural communities around the schools have been more sustainable. 71% of the teachers believe this has happened, and over a quarter (27%) think this will happen in the future. Although the energy consumption data at all sites are tracked directly by the installed photovoltaic systems, data at only one school has been analysed, showing an average consumption of 14.6 kWh per month<sup>36</sup> during November 2019 to December 2020. It means that the annual consumption at a school could be around 175.2 kWh. The PV system can afford even higher consumption, as the highest consumption rate in that timespan was only 27%.

Research shows carbon emissions generated by types of fossil fuels, as in Table 27. If the energy were generated by fossil fuels, the second largest sources of energy, which account for 32.5% of energy sources in Kenya<sup>37</sup>, it would generate 19.25 to 21.5 tons of carbon emission per kWh. An average of 20.31 tonCO<sub>2</sub> per kWh is used for calculation.

<sup>36</sup> Energy4Impact. Implementation Phase Report- PROJECT JUA: May 2019 - December 2020.

<sup>37</sup> Energypedia. [Kenya Energy Situation](#).

With solar energy, 3,558.5 tons of carbon emission (175.2 kWh x 20.31 ton<sub>CO2</sub> per kWh) would be saved at a school in a year due to Project Jua. As there are 250 school sites supported in Project Jua, a total of 889,627.38 tons of carbon emission could be saved annually. However, only 71% of survey participants has seen this outcome happen, the quantity is discounted 73% to 631,635.44 tons, to avoid overclaiming.

Table 27 Carbon emission of fossil fuels<sup>38</sup>

Type of fuels	Emission (kg <sub>CO2</sub> / GJ)	Emission (ton <sub>CO2</sub> / kWh) - converted
Fuel oil	77.4	21.50
Diesel	74.1	20.58
Crude oil	73.3	20.36
Kerosene	71.5	19.86
Gasoline	69.3	19.25
Average	73.12	20.31

The outcome is valued considering carbon price and the social cost of carbon emission. There are two primary ways for the valuation of carbon emission: Social Cost of Carbon (SCC) and target consistent approach. SCC sums up all the quantifiable costs and benefits of emitting one tonne of CO<sub>2</sub> in monetary terms and is used commonly in the US and Canada. Though it examines the impact on wider factors, some have criticised that the science used is not up to date; for example, the model used by the US government is based on the literature primarily from the 1990s and early 2000s<sup>39</sup>. In addition, many argues that lots of socioeconomic impacts of carbon emissions are difficult to quantify in monetary terms, such as civil conflict and human migration, which makes the approach problematic and some impacts thus defined as “identifiable but hard to quantify”<sup>40</sup>. Another contentious issue of SCC is the selection of discount rate, whereby the calculation weights the current costs and future benefits. While discount rates varied and are debatable<sup>41</sup>, the choice of discount rate would impact the SCC massively.

The target consistent approach, on the other hand, considers the target of carbon emissions reduction and works backwards to develop the path to meet the emission limits. Consequently, a carbon price could be set alongside the path. Its advantages over the SCC are that it could avoid the calculation ambiguity of some social impacts of climate change and that it could support countries on its way to reach emission targets<sup>42</sup>. This approach has been adopted by the UK government to evaluate policy options<sup>43</sup>. The UK government has transferred from using SCC to the target consistent approach since 2008, due to “the

<sup>38</sup> Volker Quaschnig. [Specific Carbon Dioxide Emissions of Various Fuels.](#)

<sup>39</sup> Carbon Brief (2018). [The Social cost of Carbon.](#)

<sup>40</sup> Carbon Brief (2018). [The Social cost of Carbon.](#)

<sup>41</sup> Charles Griffiths, Elizabeth Kopits, Alex Marten, Chris Moore, Steve Newbold, and Ann Wolverton (2012). [The Social Cost of Carbon: Valuing Carbon Reductions in Policy Analysis.](#)

<sup>42</sup> Carbon Brief (2018). [The Social cost of Carbon.](#)

<sup>43</sup> GOV.UK. [Carbon valuation in UK policy appraisal: a revised approach.](#)

considerable uncertainty that exists surrounding estimates of the SCC<sup>44</sup>. Despite the transition, the UK government has been considering formal modelling evidence and the social cost of carbon to set its carbon reduction targets.

Target consistent approach for carbon pricing is suitable for countries that have set carbon targets. As Kenya has a target to reduce greenhouse gas emissions by 30% by 2030<sup>45</sup>, the study believes target consistent approach is a more appropriate method to value carbon emissions in this project. Meanwhile, as the primary focus of this project is to electrify rural parts of Kenya, many social impact outcomes that materialise from the electrification in rural Kenya have been identified and quantified in monetary value in this study. To avoid double counting, target consistent approach seems a more suitable approach than SCC.

UK government suggests GBP 69 per ton of carbon emission for sectors that are not in the EU Emissions trading scheme in 2020, based on the carbon targets of the UK. While this price could be applied for valuation, as Project Jua is a project in Kenya and supported by a foundation in the UK, the study believes it is necessary to select a price that could reflect the context and targets of Kenya. There is not yet a carbon price set in Kenya<sup>46</sup>, however, a USD 25 carbon price per ton of carbon emission is expected to be implemented by 2030 for lower-income emerging countries<sup>47</sup>, according to International Monetary Fund (IMF). The price was calculated based on “the Carbon Pricing Assessment Tool”<sup>48</sup> developed by the IMF and World Bank. The model examines the carbon emission targets and climate strategies across 180 countries and sets the prices by assessing carbon emissions, fiscal, economic, public health and mitigation policies for the society<sup>49</sup>. As this proposed carbon price considers the impact on stakeholders beyond the environment, such as children, the non-working poor and vulnerable firms<sup>50</sup> and is likely to be implemented internationally<sup>51</sup>, the study believes it is reasonable to use this price as the financial proxy for this indicator. Considering that solar energy may also generate carbon emissions, the study applies a USD 2.2 offset pricing for solar energy<sup>52</sup>. Thus, the carbon price used for this indicator is USD 22.8.

*Table 28 Valuing "Tonnes of carbon emissions saved (at schools)"*

Indicator	Quantity	Financial proxy	Value in currency	Source of value
Tons of carbon emissions	631,635.44	Carbon price of USD 22.8 per ton of carbon emission	USD 12,955,760.97	International Monetary

<sup>44</sup> Department of Energy and Climate Change (2009). [Carbon Valuation in UK Policy Appraisal: A Revised Approach](#).

<sup>45</sup> Ministry of Environment and Policy (2020). [Submission of Kenya's updated nationally determined contribution](#).

<sup>46</sup> UNFCCC (2019). [Carbon pricing approaches in Eastern and Southern Africa](#).

<sup>47</sup> International Monetary Fund (2021). [Launch of IMF Staff Climate Note: A Proposal for an International Carbon Price Floor Among Large Emitters](#).

<sup>48</sup> IMF (2021). [Proposal for an International Carbon Price Floor Among Large Emitters](#).

<sup>49</sup> IMF (2019). [Fiscal Policies for Paris Climate Strategies—from Principle to Practice](#).

<sup>50</sup> IMF (2019). [Fiscal Policies for Paris Climate Strategies—from Principle to Practice](#).

<sup>51</sup> International Monetary Fund (2021). [Launch of IMF Staff Climate Note: A Proposal for an International Carbon Price Floor Among Large Emitters](#).

<sup>52</sup> Ecosystem Marketplace (2020). [Voluntary Carbon and the Post-Pandemic Recovery](#).

saved in schools				Fund <sup>53</sup> ; Ecosystem Marketplace <sup>54</sup>
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\*The value shown is after the reduction of deadweight, displacement, attribution and drop-off.

The study recognised that there is not yet a universally agreed carbon price. The global average carbon price in 2021 is at USD 22<sup>55</sup>, yet the pricing shows huge different across countries and even cities (for example, as low as USD 0.36 per tonCO<sub>2e</sub> in Ukraine, to USD 9.15 in South Africa, and to as high as USD 137.24 in Sweden<sup>56</sup>) and also across different energy generation technologies<sup>57</sup>. In the next decade, carbon prices are forecasted to rise due to tougher climate goals and the impact of COVID-19 pandemic<sup>58</sup>. The choice of carbon price would be tested in the sensitivity analysis.

### At clinics

Solar energy introduced by Project Jua has helped rural communities around the clinics become more sustainable. 92% of the health professional believe this has happened, and the rest (8%) think this will happen in the future. Energy consumption data, though are tracked directly by the installed photovoltaic systems at all sites, has been analysed only at one clinic during the timespan of this research. The analysis shows that an average 17.6 kWh was consumed per month<sup>59</sup> during November 2019 to December 2020. It means that the annual consumption at a clinic could be around 211.2 kWh. The PV system can afford even higher consumption, as the highest consumption rate in that timespan was only 15%.

If the energy were generated by fossil fuels, 4,289.71 tons of carbon emission would be produced (211.2 kWh x 20.31 tonCO<sub>2</sub> per kWh, as show in Table 27). As 50 clinics were supported in the project, 214,485.50 tons of carbon emission could be saved in total a year. However, only 92% of survey participants has seen this outcome happen, the quantity is discounted 92% to 197,326.66 tons, to avoid overclaiming. The outcome is valued using the carbon price for lower-income countries with offset pricing in solar energy, at USD 22.8 per ton of carbon emission.

Table 29 Valuing "Tonnes of carbon emissions saved (in clinics)"

Indicator	Quantity	Financial proxy	Value in currency	Source of value
Tons of carbon emissions saved in clinics	197,326.66	Carbon price of USD 22.8 per ton of carbon emission	USD 3,749,206.63	International Monetary Fund <sup>60</sup> ;

<sup>53</sup> International Monetary Fund (2021). [Launch of IMF Staff Climate Note: A Proposal for an International Carbon Price Floor Among Large Emitters.](#)

<sup>54</sup> Ecosystem Marketplace (2020). [Voluntary Carbon and the Post-Pandemic Recovery.](#)

<sup>55</sup> Bloomberg (2021). [600% Gain in Carbon Prices Vital to Rein in Global Warming.](#)

<sup>56</sup> The World Bank (2021). [Carbon Pricing Dashboard.](#)

<sup>57</sup> Ecosystem Marketplace (2020). [Voluntary Carbon and the Post-Pandemic Recovery.](#)

<sup>58</sup> The International Emissions Trading Association (2021). [IETA's 2021 GHG market sentiment survey.](#)

<sup>59</sup> Energy4Impact. Implementation Phase Report- PROJECT JUA: May 2019 - December 2020.

<sup>60</sup> International Monetary Fund (2021). [Launch of IMF Staff Climate Note: A Proposal for an International Carbon Price Floor Among Large Emitters.](#)

				Ecosystem Marketplace <sup>61</sup>
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\*The value shown is after the reduction of deadweight, displacement, attribution and drop-off.

## SROI analysis

### Overview

The result of this SROI analysis is based on the calculation of inputs for Project Jua by OVO Foundation and all outcome data gathered from stakeholders, including the quantity of outcome indicators, duration, deductions and monetary values. The social return ratio indicates the estimation of value contributed by Project Jua with the support of OVO Foundation. The high return could be understandable as there were no other similar interventions as Project Jua at the benefited schools and clinics. The estimated figure is further tested in the sensitivity analysis. Table 30 presents the results when all data is calculated in the impact map.

Table 30 Social value of Project Jua, with the support of OVO Foundation

Total investment	GBP	2,091,231.00
Total present outcomes value	GBP	27,512,944.66
Net present outcomes value	GBP	25,882,202.73
Social return on investment	GBP	10.59
Social return ratio		1:10.59

### Inputs

The main financial and non-financial inputs during the time scope of this analysis (from May 2019 to December 2020) are detailed below:

Table 31 Inputs to Project Jua

Stakeholder	Type of contribution	Input	Value (GBP)
Schools	Time	In line with SROI standard practice, beneficiaries' time is not included in the analysis.	GBP 0.00
Clinics	Time		GBP 0.00
Funder (OVO Foundation)	Funding	Grants to cover some costs in the pilot phase and to prepare for the scale-up phase.	GBP 45,424.00
	Funding	Grants to support the implementation of Project Jua.	GBP 2,045,807.00
Project delivery organisation (Energy4Impact)	Staff time	Staff time to manage and deliver Project Jua.	Covered in the funding from OVO to deliver Project Jua
Total input			GBP 2,091,231.00

<sup>61</sup> Ecosystem Marketplace (2020). [Voluntary Carbon and the Post-Pandemic Recovery](#).

## Deduction to valuation

### Deadweight for outcomes

Deadweight is the consideration of the amount of outcome that would have happened even if the project had not taken place. It is calculated as a percentage, to deduct the proportion of change that would have occurred anyway.

Table 32 Deadweight considerations

Stakeholder	Long-term outcomes	Deadweight
Schools	Improved accessibility to education in rural sites.	There is one short- and medium-term outcome related to this long-term outcome. As shown in Table 7, no teachers believe this outcome would have happened anyway. There is thus no deadweight.
	Students have better learning experience.	There are three short- and medium-term outcomes related to this long-term outcome. As shown in Table 7, no teachers believe these outcomes would have happened anyway, but one teacher (2%) think one of the outcomes didn't happen. Deadweight is thus used at 2%.
	Students perform better.	There are four short- and medium-term outcomes related to this, yet teachers were asked to share their experience with this long-term outcome. As no one believed this would have otherwise happened, deadweight is none.
Clinics	Improved accessibility to health in rural sites.	There are three short- and medium-term outcomes related to this. As shown in Table 15, no health professionals believed these outcomes would have happened anyway. There is thus no deadweight.
	Patients feel supported to access health services.	No health professionals thought that the two short- and medium-term outcomes related to this long-term outcome would have otherwise happen. There is thus no deadweight.
	More lives saved due to increased access to healthcare services	Three short- and medium-term outcomes are related to this long-term outcome, while one health professional (8%) thought one of the outcomes and would have happened even without Project Jua. Deadweight was thus found at 8%.
Environment (or the future generation in the local communities )	Tonnes of carbon emissions saved (at schools).	One short- and medium-term outcome is related to this long-term outcome. One teacher (2%) thought this would happen anyway; thus deadweight is found to be 2%.
	Tonnes of carbon emissions saved (at clinics).	There is one short- and medium-term outcome related to this long-term outcome, and no health

		professionals believe this outcome would have happened anyway. There is thus no deadweight.
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### Displacement for outcomes

Displacement is the assessment of the amount of outcome displaced by other outcomes. From the survey with stakeholders, no significant displacement was found. The only negative change, experienced by a teacher/school (2%) and two health professionals/clinics (17%), was the needs to have an inverter that could generate more wattage. This may result in the lack of stable energy and further influence the achievement of some outcomes. Some potential negative outcomes were also identified by project delivery team in the workshop, though they are not mentioned by any beneficiaries, and thus will be discussed in the sensitivity analysis.

Table 33 Displacement

Stakeholder	Long-term outcomes	Displacement
Schools	Improved accessibility to education in rural sites.	2%
	Students have better learning experience.	2%
	Students perform better.	2%
Clinics	Improved accessibility to health in rural sites.	17%
	Patients feel supported to access health services.	17%
	More lives saved due to increased access to healthcare services.	17%
Environment (or the future generation in the local communities)	Tonnes of carbon emissions saved (at schools).	0%
	Tonnes of carbon emissions saved (in clinics).	0%

### Attribution for outcomes

Attribution is the amount of outcome that was caused by the contribution of other organisations or people. Stakeholders were asked in the survey whether someone else has contributed to the outcomes. While most stakeholders thought only Project Jua contributed to the outcomes, some other contributors were identified. Survey participants' comments are quoted in quotation marks and *italics* in Table 34.

Table 34 Attribution considerations

Stakeholder	Long-term outcomes	Attribution
Schools	Improved accessibility to education in rural sites.	One survey participant (2%) thought teachers contributed to this outcome, as they have the skills to use of ICT gadgets in teaching and learning. One participant (2%) believed that the government also help, as " <i>the laptops and computers supplied to school by the government</i> ". One participant (2%) thought school alumni contributed too, as " <i>the desktop contributed by the school alumni</i> ".

Stakeholder	Long-term outcomes	Attribution
		Attribution was therefore 6%, combining the percentages mentioned above.
	Students have better learning experience.	Students' attendance and performance were improved due to extend hours of learning from night study. This could be achieved because of the <i>"co-operation among teachers, students and parents in utilising the available light to have extended night studies"</i> . 10.2% of survey participants mentioned the role of parents, as they help <i>"in bringing their children to perform night studies"</i> . 10.2% mentioned teachers' role, as they <i>"have introduced night studies which have greatly raised the school's performance."</i> 8.2% thought students' contributed as well, as <i>"there was change in attitude towards the learner, a positive attitude was seen and great motivation."</i>
	Students perform better.	
		Three other contributors were also identified by survey participants. Although their contributions may be not directly related to Project Jua, it could improve the facility and services of the schools. There was an NGO (2%) who helped build schools' toilet, a funder (2%) who funded the building of school, and another funder (2%) who supported a feeding programme.
		Attribution was thus found, using the combined percentage mentioned above, at 34.7% in total.
Clinics	Improved accessibility to health in rural sites.	One participant (8.3%) shared that project electrician also contributed to the changes, as <i>"the Maintenance that was done by the project electrician"</i> , which would influence the reliability of energy and further affect the achievement of these outcomes. Attribution was thus set at 8.3% for these outcomes.
	Patients feel supported to access health services.	
	More lives saved due to increased access to healthcare services	
Environment (or the future generation in the local	Tonnes of carbon emissions saved (at schools).	The government (such as <i>"Rural Electrification Authority"</i> and <i>"The Kwale County Government"</i> ) was believed by 6% of survey participants to have contributed to this outcome. 2% also thought <i>"electrical accessories dealers"</i> have helped.

Stakeholder	Long-term outcomes	Attribution
communities )		Attribution was therefore 8%, combining the percentages mentioned above.
	Tonnes of carbon emissions saved (in clinics).	One participant (8.3%) believed that the government (i.e., “ <i>Rural Electrification Authority</i> ”) also contributed to the outcome. Combining with the attribution to project electrician, attribution was thus found at 16.7%.

### Duration/drop-off for outcomes

Drop-off is an assessment of outcome that would reduce year by year. Survey participants were asked to share how long an outcome would last, as in Table 35 and Table 36. Drop off rates after one year for the long-term outcomes are thus calculated in Table 37, based on their related short- and medium-term outcomes.

*Table 35 Teachers' perception on the duration that the outcomes have lasted (N=48)*

	3 months	6 months	1 year	2 years	over 2 years
1. I feel supported to do my job.	0%	2%	27%	19%	52%
2. More children and young people attend schools.	0%	6%	25%	23%	46%
3. More girls attend schools.	0%	4%	31%	21%	44%
4. Students attend schools more often.	0%	13%	25%	19%	44%
5. Students perform better.	0%	13%	23%	21%	44%
6. Local businesses generate more income.	4%	13%	13%	19%	52%
7. My communities become more sustainable.	4%	10%	21%	17%	48%

*Table 36 Health professionals' perception on the duration that the outcomes have lasted (N=12)*

	3 months	6 months	1 year	2 years	over 2 years
1. I feel supported to do my job.	0%	0%	8%	0%	92%
2. More patients attend health clinics.	0%	0%	8%	0%	92%

3. Patients receive more support on healthcare.	0%	0%	8%	0%	92%
4. More lives are saved.	0%	0%	8%	0%	92%
5. The clinic has access to reliable and clean energy.	0%	0%	8%	0%	92%
6. The clinic saves costs on electricity.	0%	0%	8%	0%	92%
7. Life-saving health equipment can be powered.	0%	0%	8%	8%	83%
8. Local businesses generate more income.	0%	0%	25%	0%	75%
9. My communities become more sustainable.	0%	0%	8%	0%	92%

Table 37 Drop-off rate

Stakeholder	Outcomes	After 1 year	After 2 years
Schools	Improved accessibility to education in rural sites.	27%	20%
	Students have better learning experience.	27%	21%
	Students perform better.	23%	21%
Clinics	Improved accessibility to health in rural sites.	8%	0%
	Patients feel supported to access health services.	8%	0%
	More lives saved due to increased access to healthcare services.	8%	3%
Environment (or the future generation in the local communities)	Tonnes of carbon emissions saved (at schools).	17%	48%
	Tonnes of carbon emissions saved (in clinics).	8%	0%

### Sensitivity analysis

Social value ratio should be presented as a range, because SROI is calculated based on a mixture of data collected, subjective opinions from stakeholders involved, assumptions in proxies and considerations of deductions. Therefore, scenarios are tested to demonstrate the confidence of this SROI analysis.

### Scenario 1 – Increased deadweight.

The selected sites for Project Jua interventions were based on a needs assessment, from which the project team identified schools and clinics that did not have electricity or relied on unstable energy sources. Therefore, most of the stakeholders do not believe that similar outcome might have happened without Project Jua. However, there could be chances that the National Energy Grid of Kenya enhanced the coverage, improved the stability of energy provision and increased the provision of cleaner energy sources. The possibility of government funding was also mentioned in the workshop with project delivery team, as in *“Governments once in a while would get funding and programmes that facilitate electrification (but this takes long and dependent on funding)”*. In this scenario, each outcome is added an additional 10% deadweight.

**Scenario 2 – Increased displacement.**

Similar to the reason in scenario 1, the additionality of Project Jua could make stakeholders experience outcomes more positively than the outcomes could actually bring. There could remain unidentified negative outcomes, such as those identified by the project delivery team:

- *“Displacement of businesses that are providing diesel/ off grid.”*
- *“Less money for the national grid (solar PV is competing with national grid).”*

In this scenario, an additional 10% displacement is added.

**Scenario 3 – Increased attribution in the outcomes related to clinics.**

Currently, the contributor groups to outcomes identified by schools are much more than clinics, 8 and 2 respectively, resulting in the difference in the average attribution rate for school-related outcomes (24%) and clinic-related outcomes (10%). This may be resulted from smaller sample size in clinics (16 comparing to 49 schools), though the sampling rate for clinics (32%) is higher than that of schools (19.6%). If there were more contributors to the outcomes at clinics, the attribution rate would be higher. In this scenario, attribution rate for all clinic-related outcomes are increased by 50%.

**Scenario 4 – Reduced the duration of outcomes.**

The duration of outcomes identified by clinics (2.37 years) are 0.54 years longer than that by schools (1.83 years) on average. The may also result from the smaller sample size of clinics. Project delivery team also identified an issue of sustainability. In addition, to ensure the outcomes last, it is important for schools and clinics to set aside funding for future maintenance and replacement parts of solar PV, as current warranty is only one year. Therefore, to avoid overclaim, the duration of outcomes experienced by schools is reduced by 0.5 years and that of clinics is reduced by 0.75 years.

**Scenario 5 – Adjusted financial proxies**

Figures for financial proxies could differ by research, contexts and time. A figure chosen in this analysis is tested below.

Outcome / proxy	Quantity		Adjustments
	Original	Adjusted	
Tonnes of carbon emissions saved	USD 22.8	Raised by 20% to	Carbon price is expected to grow in the coming decade, assuming by 20% <sup>62</sup> .

<sup>62</sup> Global carbon market grew [by 20% in 2020](#).

(both at schools and clinics). / Carbon price per ton of carbon emission.		USD 27.36	
Tonnes of carbon emissions saved (both at schools and clinics). / Carbon price per ton of carbon emission.	USD 22.8	USD 19.8 (Global average in 2020)	As the current carbon price used is a price that is expected to be implemented, to reflect current context, we test the assumption using global average carbon price of USD 22 in 2020 <sup>63</sup> deducted by the carbon price for solar energy USD 2.2.

### Scenario 6 – Adjusted quantity

Some quantities chosen in the SROI calculation are based on assumptions and estimation. These quantities are tested below.

Outcome / Indicator	Quantity		Adjustments
	Original	Adjusted	
Students have better learning experience. / Time freed up for family members to pursue other activities (in hours)	8,469,309	5,081,585	Assuming parents need to spend 0.5 hours to pick their children up from schools, time freed up a day would be reduced to 1.5 hours. In addition, as there could be pre-school age children in the families or parents may have their children study at schools outside of their own county, the number of students is reduced by 20% for testing. With these consideration, total hours freed up are 5,081,585 a year.
Patients feel supported to access health services. / Increased number of patients served.	17,453	8,727	As several factors may influence the number of patients served, such as the capacity at clinics, the actual patients requesting health services and their frequency of visits. In addition, during the verification with Energy4Imapct, it is understood that patients usually go to the clinics during the daytime. Thus, though night services were introduced, the increased capacity may not be used fully. With these considerations, the quantity is reduced by 50% to avoid overclaiming.

Table 35 summarises the different values resulting from six scenarios. **The sensitivity analysis provides a SROI range from GBP 9.35 to GBP 12.48.** The analysis demonstrates

<sup>63</sup> Bloomberg (2021). [600% Gain in Carbon Prices Vital to Rein in Global Warming](#).

that the changes in carbon price for the tonnes of carbon emissions saved would impact the value the most. The carbon price used in calculation, when adjusted to a higher or lower price, the value will change significantly. As carbon prices varies across countries and are forecasted to grow in the coming years, it is advised that carbon prices be monitored to adjust the value of this project.

Table 38 Sensitivity analysis

Scenario	Sensitivity Test	Outcomes tested	Adjustment	New SROI	Difference from baseline SROI
1	Increased deadweight.	All outcomes.	+10%	GBP 9.52	- GBP 1.07
2	Increased displacement.	All outcomes.	+10%	GBP 9.53	- GBP 1.06
3	Increased attribution in the outcomes related to clinics.	All outcomes related to clinics	x(1+50%)	GBP 10.30	- GBP 0.29
4	Reduced the duration of outcomes.	All outcomes related to schools.	- 0.5 years	GBP 10.59	No difference
		All outcomes related to clinics	- 0.75 years	GBP 9.65	- GBP 0.94
5	Adjusted financial proxies.	Tonnes of carbon emissions saved (both at schools and clinics).	+20%	GBP 12.48	+ GBP 1.89
			USD 19.8 instead of USD 22.8	GBP 9.35	- GBP 1.14
6	Adjusted quantity	Students have better learning experience.	- 40% of hours	GBP 10.23	- GBP 0.36
		Patients feel supported to access health services.	- 50% of patients	GBP 10.54	- GBP 0.06

# Future Builders

## Outcomes and values

### Theory of Change for young people

The relationships between activities and outcomes are presented below. The chain of events was created based on the consultation with Future Builders' charity partners, the qualitative feedback from young people in the surveys, the discussion with the OVO project team, and the judgement of the evaluator.

Figure 4 Theory of Change for young people in Future Builders



### Material outcomes for young people

Young people were invited to share their experience of the outcomes. The study judges an outcome to be relevant if the percentage of those saying “I have seen this” is higher than the average percentage of “I have seen this” across all outcomes (i.e. 62%) or if the combined percentage of “I have seen this” and “I think I will see this happen” for an outcome exceeds the average combined percentage of these two opinions for all the outcomes (i.e. 82%).

Table 41 Young people's experience of the outcomes (N=18)

Outcomes	I have seen this	I think I will see this happen	This would have happened anyway	It didn't happen and/or will not happen	relevance judgement
1. Make progress with your needs	72%	22%	0%	6%	relevant
2. Ready for education, employment, and training	67%	0%	28%	6%	relevant
3. Maintain tenancy	83%	6%	11%	0%	relevant
4. Bring properties back into use	63%	13%	6%	19%	relevant

5. Achieve qualifications	44%	22%	6%	28%	not relevant
6. Gain professional experience	50%	22%	17%	11%	partially relevant
7. Save money	56%	28%	11%	6%	relevant
8. Live in supported and affordable housing	89%	11%	0%	0%	relevant
9. Grow and sustain your wellbeing	61%	28%	6%	6%	relevant
10. Sustain employment	61%	17%	11%	11%	partially relevant
11. Move on to positive accommodation	22%	61%	0%	17%	relevant
12. Live independently	72%	11%	11%	6%	relevant

Young people were also invited to rate the importance of each outcome. The study defines an outcome as important if the percentage of those expressing “very important” for an outcome is higher than the average percentage of “very important” across all outcomes (i.e. 58%) or if the combined percentage of “very important” and “quite important” for an outcome is higher than the average combined percentage of these two options for all the outcomes (i.e. 88%).

*Table 42 Young people’s rating of importance of the outcomes (N=18)*

Outcomes	not important	less important	so-so	quite important	very important	importance judgement
1. Make progress with your needs	0%	0%	11%	22%	67%	important
2. Ready for education, employment, and training	0%	6%	6%	39%	50%	important
3. Maintain tenancy	0%	0%	0%	12%	88%	important
4. Bring properties back into use	6%	13%	25%	44%	13%	not important
5. Achieve qualifications	0%	11%	22%	39%	28%	not important
6. Gain professional experience	0%	6%	22%	22%	50%	not important
7. Save money	0%	0%	11%	39%	50%	important

8. Live in supported and affordable housing	0%	0%	0%	39%	61%	important
9. Grow and sustain your wellbeing	0%	0%	6%	28%	67%	important
10. Sustain employment	0%	0%	6%	39%	56%	important
11. Move on to positive accommodation	0%	0%	0%	22%	78%	important
12. Live independently	0%	0%	0%	11%	89%	important

The study values all medium-term and long-term outcomes that are identified as material with young people, as outcome data have been tracked in the programme and young people that have progressed from one stage to the next do not overlap, which could mitigate the concerns of double counting.

Some outcomes were then identified as not material, as shown in Table 43. Although “Bring properties back into use” was not identified as a material outcome by young people, it was considered important by OVO Foundation and charity partners, as this outcome serves as the foundation of some other outcomes material to young people (i.e. outcomes 7-12 in the table). The study then uses it as an indicator when valuing a medium-term outcome “Young people live in supported and affordable housing”. The other non-material outcomes, “Achieve qualifications” and “Gain professional experience” were not valued but included in the Theory of Change as medium-term outcomes.

*Table 43 Materiality judgement*

Time horizon	Outcomes	relevance judgement	importance judgement	materiality
Short-term	1. Make progress with your needs	relevant	important	material
Short-term	2. Ready for education, employment, and training	relevant	important	material
Short-term	3. Maintain tenancy	relevant	important	material
Short-term	4. Bring properties back into use	relevant	not important	not material
Medium-term	5. Achieve qualifications	not relevant	not important	not material
Medium-term	6. Gain professional experience	partially relevant	not important	not material
Medium-term	7. Save money	relevant	important	material
Medium-term	8. Live in supported and affordable housing	relevant	important	material
Long-term	9. Grow and sustain your wellbeing	relevant	important	material
Long-term	10. Sustain employment	partially relevant	important	material
Long-term	11. Move on to positive accommodation	relevant	important	material

Long-term	12. Live independently	relevant	important	material
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## Valuation of outcomes

### Outcome: Young people can save money while maintaining tenancy.

To value this outcome, the indicator chosen is the money saved by young people by living in Future Builders homes instead of renting outside, as this is the main costs saved for young people. Young people also agree with the relative low rent in Future Builder homes, such as in these quotes from young people, “I have been able to maintain my tenancy because it isn’t really expensive and this has helped.”; and “I love the fact that I can save money from my flat.”

The value for proxy is calculated by comparing the rent in Future Builders homes and local housing allowance in the corresponding cities. The study used the figure for local housing allowance during April 2019 to March 2020, as it intends to compare the money saved during the span of the evaluation scope (2019 to 2020).

Table 44 Local housing allowance

	Future Builders rent	Local housing allowance 2019/2020 <sup>64</sup>	Money saved /week /person	Money saved /year /person
Bristol	£ 48.82	£ 85.92	£ 37.10	£ 1,929.20
Sheffield	£ 30.00	£ 65.59	£ 35.59	£ 1,850.68
Norfolk	£ 50.00	£ 74.79	£ 24.79	£ 1,289.08
Perth	£ 47.50	£ 57.69	£ 10.19	£ 529.88

The quantity for young people living in Future Builders homes in the four cities is drawn from Future Builders programme reporting.

Table 45 Valuing “Young people can save money.”

Indicator	Quantity	Financial proxy	Value in currency	Source of value
Number of young people saving money and living in Future Builders homes in Bristol	32	Rent saved per year per person	GBP 1,929.20	GOV.UK <sup>65</sup>
Number of young people saving money and living in Future Builders homes in Sheffield	13	Rent saved per year per person	GBP 1,850.68	GOV.UK <sup>66</sup>

<sup>64</sup> GOV.UK. [Local Housing Allowance \(LHA\) rates applicable from April 2019 to March 2020.](#)

<sup>65</sup> GOV.UK. [Local Housing Allowance \(LHA\) rates applicable from April 2019 to March 2020.](#)

<sup>66</sup> GOV.UK. [Local Housing Allowance \(LHA\) rates applicable from April 2019 to March 2020.](#)

Number of young people saving money and living in Future Builders homes in Norfolk	6	Rent saved per year per person	GBP 1,289.08	GOV.UK <sup>67</sup>
Number of young people saving money and living in Future Builders homes in Perth	3	Rent saved per year per person	GBP 529.88	GOV.SCOT <sup>68</sup>

**Outcome: Young people feel supported living in affordable housing.**

To value this outcome, the study looks at two approaches: (1) The rent generated by having young people housed in the properties refurbished in 2019-2020 and (2) The cost saved on society for young homeless not in education, employment or training (NEET) people.

For the first indicator, the derelict properties were brought back to use, allowing young people to have an affordable house to live in. Although “Bring properties back into use” was not identified as a material outcome by young people, it serves as the basis of some other outcomes material to young people, as it offers young people an affordable place to live. The valuation looks at the rent generated by housing young people in the properties refurbished in 2019-2020 in the four cities. During 2019 and 2020, the number of houses refurbished is listed in Table 46, supporting 23 young people in total. This number is drawn from Future Builders programme reporting.

Table 46 Houses refurbished

	Houses refurbished in 2019-2020	People housed	Rent paid by a young person/ year
Bristol	1 three bedroom house 1 two bedroom house	5	GBP 585.84
Sheffield	3 three bedroom houses	9	GBP 360.00
Norfolk	2 three bedroom houses	6	GBP 600.00
Perth	3 one bedroom flats	3	GBP 570.00

The study also considers another indicator, the number of young people not in education, employment or training (NEET). Young homeless NEET people are given a chance to live in Future Builders homes. They will be supported to address their individual needs and be prepared for education, employment and training. This could be evidenced by some quotes from young people:

- *“I have support here if and when I have needed it. If I have needed help in the house Ray has been able to help me. I feel supported because I have been able to stay here and I think once I gain employment I will feel more positive. I have had support with employability through Roundabout.”*

<sup>67</sup> GOV.UK. [Local Housing Allowance \(LHA\) rates applicable from April 2019 to March 2020.](#)

<sup>68</sup> GOV.scot. [Local Housing Allowance Rates: 2019-2020.](#)

- “They offered sound advice and they were incredibly supportive towards me and everything I have done. Absolutely fantastic!”
- “I became better at asking for help when I needed it.”
- “I feel that the experience has been positive and the support has been positive.”

The support in the programme could potentially save the cost on society, such as lost taxes, welfare benefits and homelessness. The financial proxy chosen is the cost of NEET (not in education, employment or training) homeless young person aged 18-24 per year<sup>69</sup>.

Table 47 Valuing “Live in supported and affordable housing.”

Indicator	Quantity	Financial proxy	Value in currency	Source of value
Number of people housed in the properties refurbished in 2019-2020 in Bristol	5	Rent generated per year	GBP 585.84	Future Builders reporting
Number of people housed in the properties refurbished in 2019-2020 in Sheffield	9	Rent generated per year	GBP 360.00	Future Builders reporting
Number of people housed in the properties refurbished in 2019-2020 in Norfolk	6	Rent generated per year	GBP 600.00	Future Builders reporting
Number of people housed in the properties refurbished in 2019-2020 in Perth	3	Rent generated per year	GBP 570.00	Future Builders reporting
Number of people housed in a Future Builders property	54	Cost of NEET homeless young person aged 18-24 per year	GBP 19,400	CentrePoint <sup>70</sup>

### Outcome: Young people move on to a positive accommodation pathway.

To value this outcome, the study looks at the number of young people that have moved on to a positive accommodation pathway, which means the accommodation is considered a sustainable and positive step for young people. Moving on from Future Builders homes indicates that young people are able to pay for their accommodation. The quantity is drawn from Future Builders programme reporting, and the financial proxy considers the “the value of being able to pay for housing” suggested by HACT<sup>71</sup>.

<sup>69</sup> CentrePoint (2016). [Is prevention cheaper than cure? An estimation of the additional costs of homelessness for NEET young people.](#)

<sup>70</sup> CentrePoint (2016). [Is prevention cheaper than cure? An estimation of the additional costs of homelessness for NEET young people.](#)

<sup>71</sup> HACT (2014). [Measuring the Social Impact of Community Investment: A Guide to using the Wellbeing Valuation Approach.](#)

Table 48 Valuing “Move on to positive accommodation pathway.”

Indicator	Quantity	Financial proxy	Value in currency	Source of value
Number of people moving on to positive accommodation pathway	13	The value of being able to pay for housing	GBP 7,347	HACT <sup>72</sup>

**Outcome: Young people sustain employment.**

The programme has monitored the number of young people who have sustained employment after they moved on from the programme. Of the 17 young people who moved on from living in a Future Builders home during 2020, 10 had sustained employment after 3 months. To value this outcome, the study selects the minimum wage in the UK for aged 21 to 22 as the financial proxy, and calculates the equivalent annual salary.

Table 49 Minimum wage in the UK

Minimum wage per hour in the UK for aged 21 to 22 <sup>73</sup>	GBP 8.36
Average actual weekly hours of work for full-time workers <sup>74</sup>	33.7 hours
Calculated minimum wage per week in the UK for aged 21 to 22	GBP 281.732
Calculated minimum wage per year in the UK for aged 21 to 22	GBP 14,650.06

Table 50 Valuing “Sustain employment”

Indicator	Quantity	Financial proxy	Value in currency	Source of value
Number of people sustaining employment	10	Minimum wage per year in the UK for aged 21 to 22	GBP 14,650.06	GOV.UK <sup>75</sup> ; Office of National Statistics <sup>76</sup>

**Outcome: Young people grow and sustain their wellbeing.**

Young people can grow and sustain their wellbeing with the range of support in the programme. In the survey, 61% of young people have experienced this and 28% think they will see this outcome happen. The number of young people that have or will have grown and sustained their wellbeing is estimated below. The financial proxy used is the feeling of in control of one’s life, as young people could avoid falling back to homelessness and gain control of their lives, as they grow and sustain wellbeing.

<sup>72</sup> HACT (2014). [Measuring the Social Impact of Community Investment: A Guide to using the Wellbeing Valuation Approach.](#)

<sup>73</sup> GOV.UK. [National Minimum Wage and National Living Wage rates.](#)

<sup>74</sup> Office of National Statistics (2021). [Average actual weekly hours of work for full-time workers \(seasonally adjusted\)](#)

<sup>75</sup> GOV.UK. [National Minimum Wage and National Living Wage rates.](#)

<sup>76</sup> Office of National Statistics (2021). [Average actual weekly hours of work for full-time workers \(seasonally adjusted\)](#)

*Table 51 The quantity for “Grow and sustain your wellbeing”*

Young people involved in the programme since October 2019	88 people
% of survey participants have seen or think they will see this outcome happened: “Grow and sustain your wellbeing”	89%
Estimated number of young people that grow and sustain wellbeing	78 people

*Table 52 Valuing “Young people grow and sustain their wellbeing”*

Indicator	Quantity	Financial proxy	Value in currency	Source of value
Number of people that grow and sustain their wellbeing	78	The value of feeling in control of life (per person per year)	GBP 12,470	HACT <sup>77</sup>

**Outcome: Young people live independently.**

During 2020, 17 young people had moved on from Future Builders to live independently. The ultimate goal of the Future Builders programme is to break the cycle of homelessness for young people. The valuation so far examines what have changed during 2019-2020 but not the impact the programme could potentially bring to the young people in a lifetime horizon. Research in a similar context applies a “whole-life” perspective to value the impact of interventions for young homeless people<sup>78</sup>, which is an appropriate consideration for this programme as well.

The life-time public finance costs of NEET young people are estimated at £56,301 in 2010<sup>79</sup>, including cost of cash benefits associated with unemployment, childcare and support services. The cost is then weighted by 2.69 times due to the cost factor of NEET young people who were also homeless<sup>80</sup>, because the public cost of NEET homeless young person aged 18-24 is £19,400 per year, 2.69 times more than that of NEET young person (£7,200). Adopting this valuation logic by taking into account annual inflation rates from 2010 to 2020<sup>81</sup>, successful transformation for a NEET young homeless person to live independently could potentially save lifetime public costs of GBP 182,966.63.

*Table 53 Valuing “Young people live independently”*

Indicator	Quantity	Financial proxy	Value in currency	Source of value
Number of young people moving on	17	The lifetime public costs saving for a	GBP 182,966.63	The Centre for Community

<sup>77</sup> HACT (2014). [Measuring the Social Impact of Community Investment: A Guide to using the Wellbeing Valuation Approach.](#)

<sup>78</sup> The Centre for Community Research (2017). [Review and Appraisal of the St Basils / SWBNHST Live and Work Scheme.](#)

<sup>79</sup> University of York (2010). [Estimating the life-time cost of NEET: 16-18 year olds not in Education, Employment or Training.](#)

<sup>80</sup> CentrePoint (2016). [Preventing youth homelessness: What works?](#)

<sup>81</sup> Macrotrends. [U.K. Inflation Rate - Historical Data.](#)

from the Future Builders homes		NEET young homeless person		Research <sup>82</sup> ; University of York <sup>83</sup> ; CentrePoint <sup>84</sup>
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## SROI analysis

### Overview

The result of this SROI analysis is based on the calculation of inputs for Future Builders by OVO Foundation and all outcome data gathered from stakeholders, including the quantity in the outcome indicators, duration of changes, deductions and monetary values. The social return ratio indicates the estimation of value contributed by Future Builders with the support of OVO Foundation. The estimated figure is further tested in the sensitivity analysis.

Table 54 SROI for Future Builders

Total investment	GBP 942,462.00
Total present outcomes value	GBP 4,974,600.19
Net present outcomes value	GBP 4,032,138.19
Social return on investment	5.28
Social return ratio	1:5.28

### Inputs

The main financial and non-financial inputs during the time scope of this analysis (2019 to 2020) are detailed below:

Table 55 Input to Future Builders

Stakeholder	Type of contribution	Input	Value (GBP)
Young people	Time	In line with SROI standard practice, beneficiaries' time is not included in the analysis.	GBP 0.00
Funder (OVO Foundation)	Funding	Grants for the four charities to deliver the programme	GBP 942,462.00
Charities	Staff time	Staff time to manage and deliver Future Builders.	Covered in the funding from OVO
Total input			GBP 942,462.00

<sup>82</sup> The Centre for Community Research (2017). [Review and Appraisal of the St Basils / SWBNHST Live and Work Scheme.](#)

<sup>83</sup> University of York (2010). [Estimating the life-time cost of NEET: 16-18 year olds not in Education, Employment or Training.](#)

<sup>84</sup> Macrotrends. [U.K. Inflation Rate - Historical Data.](#)

## Deduction to valuation

### Deadweight for outcomes

Deadweight for each outcome is calculated using the combined percentage of these two options in Table 41: “This would have happened anyway” and “It didn’t happen and/or will not happen”.

### Displacement for outcomes

In the survey with young people, one person (1 out of 18 = 5.5%) expressed a negative change, “Living with other people is hard”, which could potentially deduct the value for the below indicators related to living with others. 5.5% displacement is thus applied to these indicators.

- Number of young people saving money and living in Future Builders homes
- Number of people housed in the properties refurbished in 2019-2020
- Number of people housed in a Future Builders property
- Number of people moving on to positive accommodation pathway
- Number of people that grow and sustain their wellbeing

Another person (1 out of 18 = 5.5%) shared, “Most have been positive, however sometimes my anxiety is worst when being at home alone and leaving the home address.” This negative feeling could influence the indicators below, and thus a 5.5% displacement is used for them:

- Number of people that grow and sustain their wellbeing
- Number of young people moving on from the Future Builders homes

### Attribution for outcomes

Young people were invited to identify other contributors to their changes. The table below shows the contributors mentioned by young people. It is difficult to weight which contributor is more important than the others. The study thus counts the number of young people mentioning the contributor and calculates its percentage of total mentions.

Table 56 Other contributors

Type	Contributor	Number and % of participants mentioning this factor		
Future Builders team	Charity partners	8	32.0%	68.0%
	Support workers	9	36.0%	
Other stakeholders	Solicitors	1	4.0%	32.0%
	Friends	2	8.0%	
	Housemates	1	4.0%	
	College	1	4.0%	
	Personal therapists	1	4.0%	
	Parents	1	4.0%	
	Landlords and assistants	1	4.0%	

As 32% of the mentions are the groups that are not regarded as stakeholders in the Future Builders programme, 32% is used to deduct all indicators, except for “Number of young people saving money and living in Future Builders homes”; “Number of people housed in the properties refurbished in 2020”; and “Number of people housed in a Future Builders property”, as the accommodation opportunities were provided by the Future Builders programme and no other stakeholders mentioned by the participants could have contributed to this change.

### Duration and drop-off

Young people shared how long they think the changes would last, as in Table 57. The figures are used to calculate potential drop-off rate, as in Table 58.

*Table 57 Young people’s perception on the duration that the outcomes have lasted (N=18)*

Outcomes	3 months	6 months	1 year	2 years	over 2 years	Weighted duration (years)
1. Make progress with your needs	0%	28%	11%	0%	61%	1.78
2. Ready for education, employment, and training	17%	11%	22%	6%	44%	1.54
3. Achieve qualifications	12%	6%	24%	6%	53%	1.74
4. Gain professional experience	17%	22%	17%	0%	44%	1.43
5. Maintain tenancy	17%	11%	11%	11%	50%	1.68
6. Bring properties back into use	24%	29%	6%	12%	29%	1.24
7. Save money	0%	22%	11%	6%	61%	1.86
8. Live in supported and affordable housing	12%	18%	18%	12%	41%	1.56
9. Grow and sustain your wellbeing	6%	11%	22%	0%	61%	1.82
10. Sustain employment	11%	11%	22%	0%	56%	1.69
11. Move on to positive accommodation	12%	12%	12%	6%	59%	1.79
12. Live independently	11%	17%	0%	11%	61%	1.86

*Table 58 Drop-off rate*

Long-term outcomes	Relevant short- and medium-term outcomes	After 1 year	After 2 years
Move on to positive accommodation	Maintain tenancy	39%	11%
	Save money	33%	6%
	Live in supported and affordable housing	47%	12%
Sustain employment		44%	0%
Grow and sustain their wellbeing		39%	0%
Live independently		28%	11%

For the outcome “Live independently”, as the study values it by the lifetime public costs saving for a NEET young homeless person, it could be contradictive to apply a duration for analysis. If the outcome could be achieved, the lifetime public costs would be saved permanently rather than annually. The study thus uses a duration of one year for this outcome, to imply this one-off, lifetime saving. However, there could be drop-off, meaning

that some young people could fall back to not being able to live independently. In this case, the lifetime public costs would recur. The study thus applied drop-off rate for this outcome.

## Sensitivity analysis

Five scenarios are considered to test the confidence of this SROI. **The sensitivity analysis shows a SROI range from GBP 4.70 to GBP 5.28.** It shows that the changes in deadweight and displacement could impact the SROI the most. It is suggested that the programme continue to collect data about the number of young people who have experienced certain changes and if some other negative changes have arisen from the intervention.

Table 59 Sensitivity overview for Future Builders

Scenario	Sensitivity test and outcome tested	Adjustment	New SROI	Difference from baseline SROI
1	Increased deadweight by 10% for all outcomes, assuming some more changes would have happened anyway.	+10%	4.70	- 0.58
2	Increased displacement by 10% for all outcomes, assuming there could be more negative changes yet were not able to be identified in this study.	+10%	4.71	- 0.57
3	Raised attribution from 32% to 40% for the outcomes that have been deducted.	+8%	4.96	- 0.32
4	Reduced the duration by 10% for all outcomes, except for “Young people live independently.”	-10%	5.28	No difference
5	Adjust the quantity for this outcome “Young people grow and sustain their wellbeing” from 78 to 54 people, to only include those who answered they have experienced the change (61% of 88 people) – not the ones who expect to see this change happen.	from 78 to 54 people	5.02	- 0.26
6	Adjust the salary the financial proxy for this outcome “Young people sustain employment” from GBP 14,650.06 to GBP 10,000.	from GBP 14,650.06 to GBP 10,000	5.24	- 0.04

# OVO Gives Back

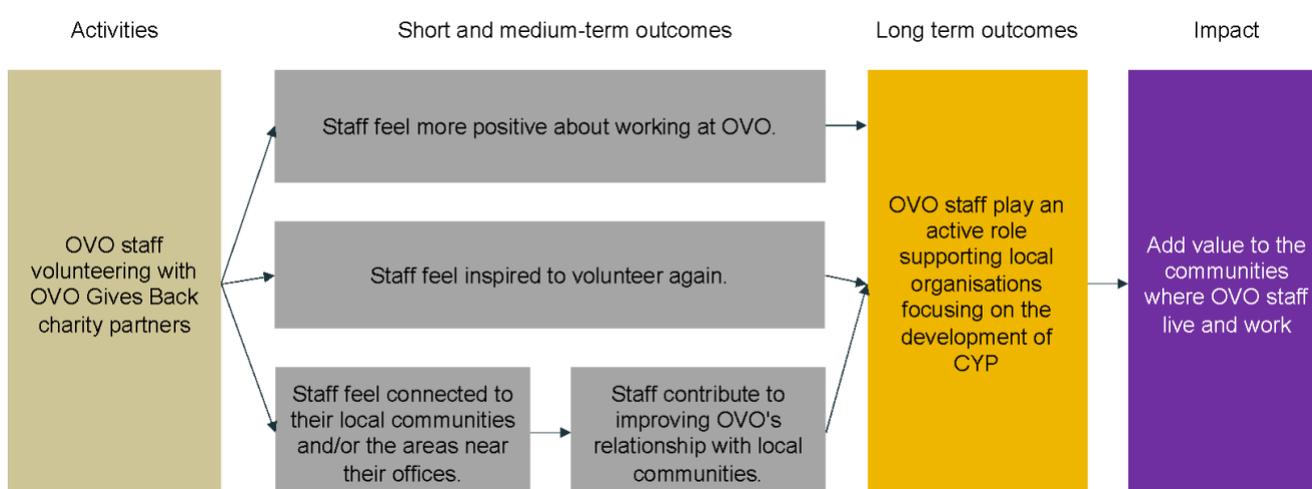
## Outcomes and values

### Outcomes for staff volunteers

#### Theory of Change for staff volunteers

The relationships between activities and outcomes are presented below. The chain of events was created based on the consultation workshop with staff volunteers, the qualitative feedback from OVO staff in the surveys, the discussion with the OVO project team and the judgement of the evaluator.

Figure 5 Theory of Change for staff volunteers in OVO Gives Back



Only one long-term outcome is identified in the workshop with staff members. The study thus assumes that if the short- and medium-term outcomes could happen, the long-term outcome would be achieved. To avoid overcounting, the study then focuses on understanding the staff's experience on the short- and medium-term outcomes.

#### Material outcomes for staff volunteers

Staff volunteers were invited to share their experience of the outcomes. All of the outcomes are identified as material, as they are all relevant and important from staff volunteers' perspective. The majority of staff believe outcomes have happened or will happen (as in Table 62) and regard all outcomes as "very important" or "quite important" (as in Table 63).

Table 62 Staff's experience of the outcomes (N=11)

Outcomes	I have seen this	I think I will see this happen	This would have happened anyway	It didn't happen and/or will not happen	relevance judgement
1. I feel more positive about working at OVO.	82%	9%	9%	0%	relevant

2. I feel inspired to volunteer again.	82%	18%	0%	0%	relevant
3. Other colleagues are inspired to volunteer.	64%	18%	9%	9%	relevant
4. I feel connected to my local community and/or the areas near my office.	73%	18%	9%	0%	relevant
5. My volunteering helps OVO's charity partners to meet their anticipated outcomes.	64%	18%	18%	0%	relevant
6. I contributed to improving OVO's relationship with local communities.	73%	18%	9%	0%	relevant

*Table 63 Staff's rating of importance of the outcomes (N=11)*

Outcomes	not important	less important	so-so	quite important	very important	importance judgement
1. I feel more positive about working at OVO.	0%	0%	9%	9%	82%	important
2. I feel inspired to volunteer again.	0%	0%	9%	36%	55%	important
3. Other colleagues are inspired to volunteer.	0%	0%	0%	27%	73%	important
4. I feel connected to my local community and/or the areas near my office.	0%	0%	9%	27%	64%	important
5. My volunteering helps OVO's charity partners to meet their anticipated outcomes.	0%	0%	18%	18%	64%	important
6. I contributed to improving OVO's relationship with local communities.	0%	0%	9%	27%	64%	important

As all short- and medium-term outcomes are identified as material, the study values all of these outcomes, which will be discussed in the following sections.

### **Valuation of outcomes for staff volunteers**

**Outcome: Staff feel more positive about working at OVO.**

The indicator used for this outcome is the number of people feeling more positive about working at OVO. Based on the survey response, the study estimated the number of staff volunteers that would feel more positive after the volunteering.

*Table 64 Estimated number of staff that have or will have experienced this outcome*

Number of volunteers	77
% who have seen or think they will have seen this change	91%
Estimated number of volunteers that have seen or think they will have seen this change	70

In terms of financial proxy, as staff mentioned that OVO might otherwise conduct team building days to make staff feel positive, the study looks at the cost of team building events at similar scale. From OVO Foundation’s previous conversation with charities to arrange team building events, the costs were between GBP 50-80 per person plus 20% VAT. A median price of GBP 65 plus VAT is used, meaning that it could have cost GBP 78 per person to participate in team building events. It is assumed that each staff would have joined team building events three times to achieve the same outcome, as staff has volunteered for an average of 3.2 days with OVO Gives Back charity partners. The estimated cost for a person joining team building events three times is GBP 234.

*Table 65 Valuing “Staff feel more positive about working at OVO.”*

Indicator	Quantity	Financial proxy	Value in currency	Source of value
Number of people feeling more positive	70	Cost of three team building events per person	GBP 234	OVO’s experience

**Outcome: Staff feel inspired to volunteer again.**

Two types of indicators are used to value the outcome of feeling inspired to volunteer: (1) staff monetary contribution to the charities (i.e. donation) and (2) staff’s extra time in volunteering. In the survey, staff were asked, “Have you contributed other resources to an OVO Gives Back charity partner? If yes (that you have contributed other resources to an OVO Gives Back charity partner) and regardless of whether it was a financial donation or not, how much would you value your contribution financially (ie. in £)?” Results are detailed in the table below.

*Table 66 Staff’s extra contribution to the charities*

Extra contribution	% of survey participants	Estimated staff (out of 77)	Estimated total amount
None	54.5%	42	0
GBP 50	18.2%	14	GBP 700
GBP 100	9.1%	7	GBP 700
A volunteering day (8 hours)*	9.1%	7	56 hours
Two volunteering days (16 hours)	9.1%	7	112 hours

*\*Assuming each volunteering day is eight hours. This assumption has been checked with OVO project team.*

As for proxy, actual donation is used if staff provided it to charities. As for additional volunteering time, the study uses the value of volunteering per hour published by Office for National Statistics<sup>85</sup>, which found that unpaid volunteering work could potentially generate a value of GBP 14.43 per hour<sup>86</sup>.

*Table 67 Valuing “Staff feel inspired to volunteer again.”*

Indicator	Quantity	Financial proxy	Value in currency	Source of value
Extra hours staff spent in volunteering	168	The value of volunteering per hour	GBP 14.43	Office for National Statistics <sup>87</sup>
Extra donation made by staff after volunteering	14	Extra donation made by staff after volunteering	GBP 50	Staff survey
Extra donation made by staff after volunteering	7	Extra donation made by staff after volunteering	GBP 100	Staff survey

**Outcome: Staff feel connected to their local community and/or areas near the office.**

The indicator used for this outcome is the number of people who feel connected to their local community and/or areas near the office. Based on the survey response, the study estimated the number of staff volunteers that have or will have experienced this change.

*Table 70 Estimated number of staff that have or will have experienced this outcome*

Number of volunteers	77
% who have seen or think they will have seen this change	91%
Estimated number of volunteers that have seen or think they will have seen this change	70

The financial proxy chosen is the value of feeling belonging to neighbourhood, suggested by HACT<sup>88</sup>.

*Table 71 Valuing “Staff feel connected to their local community and/or areas near the office.”*

Indicator	Quantity	Financial proxy	Value in currency	Source of value
Number of people who feel connected to their local community and/or	70	The value of feeling belonging to neighbourhood	GBP 3,753	HACT <sup>89</sup>

<sup>85</sup> Office for National Statistics (2017). [Billion pound loss in volunteering effort.](#)

<sup>86</sup> Office for National Statistics (2017). [Billion pound loss in volunteering effort.](#)

<sup>87</sup> Office for National Statistics (2017). [Billion pound loss in volunteering effort.](#)

<sup>88</sup> HACT (2014). [Measuring the Social Impact of Community Investment: A Guide to using the Wellbeing Valuation Approach.](#)

<sup>89</sup> HACT (2014). [Measuring the Social Impact of Community Investment: A Guide to using the Wellbeing Valuation Approach.](#)

areas near the office				
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**Outcome: Staff feel contributing to improving OVO’s relationship with the communities.**

The indicator for this outcome is the hours spent by OVO staff volunteering in the communities through OVO Gives Back. In the survey, staff volunteers have shared their actual time spent in volunteering, which is used to estimate the total time spent by all staff volunteers.

*Table 72 Estimated volunteering hours with the charities*

Number of volunteering days	% of survey participants	Estimated staff (out of 77 volunteers)	Estimated total days
1	54.5%	42	42
2	9.1%	7	14
4	9.1%	7	28
5	9.1%	7	35
6	9.1%	7	42
12.5	9.1%	7	87.5
sum			248.5 days
hours			1,988 hours

Similarly, the volunteering hours are valued using the value of unpaid volunteering published by Office for National Statistics<sup>90</sup>.

*Table 73 Valuing “Staff contribute to improving OVO’s relationship with the communities.”*

Indicator	Quantity	Financial proxy	Value in currency	Source of value
Hours spent by OVO staff volunteering in the communities	1,988	The value of volunteering per hour	GBP 14.43	Office for National Statistics <sup>91</sup>

**Outcomes for charities**

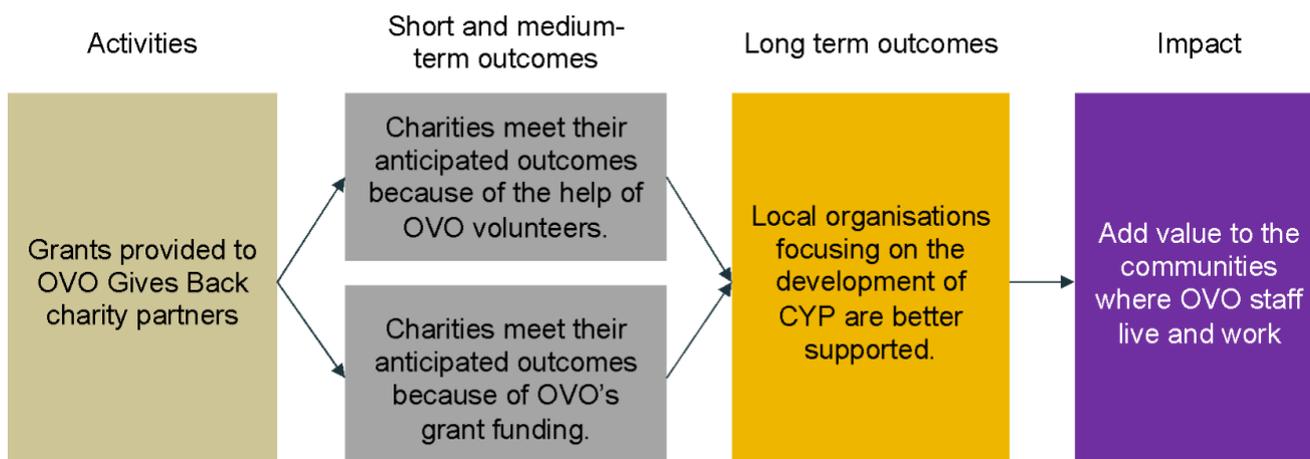
**Theory of Change for charity**

The relationships between activities and outcomes are presented below. Only two outcomes were identified. The chain of events was created based on the consultation workshop with charity partners, the qualitative feedback from charity partners in the surveys, the discussion with the OVO project team and the judgement of the evaluator.

<sup>90</sup> Office for National Statistics (2017). [Billion pound loss in volunteering effort.](#)

<sup>91</sup> Office for National Statistics (2017). [Billion pound loss in volunteering effort.](#)

Figure 6 Theory of Change for charity partners in OVO Gives Back



### Material outcomes for charities

Charity partners were invited to share their experience of the outcomes. Among the 11 survey participants, 4 charities did not have OVO volunteers due to Covid-19 pandemic. Thus, their answers to the outcome “OVO volunteers have helped us meet our anticipated outcomes” were omitted in analysis. In this case, the outcome “OVO funding has helped us meet our anticipated outcomes” is identified as material, as 100% of charities considered it relevant and important.

The other outcome, “OVO volunteers have helped us meet our anticipated outcomes”, does not show the same level of consensus from charities. However, the majority still believe they have or will have experienced this (71%) and that the outcome is important (54%). The outcomes is thus included in the valuation.

Table 74 Charities’ experience of the outcomes

Outcomes	I have seen this	I think I will see this happen	This would have happened anyway	It didn’t happen and/or will not happen	relevance judgement
1. OVO volunteers have helped us meet our anticipated outcomes. (N=7)	57%	14%	0%	29%	partially relevant
2. OVO funding has helped us meet our anticipated outcomes. (N=11)	100%	0%	0%	0%	relevant

Table 75 Charities’ rating of the importance of the outcomes

Outcomes	not important	less important	so-so	quite important	very important	importance judgement
1. OVO volunteers have helped us meet our anticipated outcomes. (N=7)	14%	29%	0%	29%	29%	partially important

2. OVO funding has helped us meet our anticipated outcomes. (N=11)	0%	0%	0%	18%	82%	important
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## Valuation of outcomes for charities

### Outcome: Charities meet their anticipated outcomes because of the help of OVO volunteers.

Many charities believe that OVO's volunteers have provided helpful support, such as in these quotes:

- “[The charity’s programmes] rely on donations and volunteers, so OVO getting involved helped us achieve our goals as well as inspire others to get involved.”
- “We have been able to significantly scale up our reach and impact with the support from OVO Gives Back. Hopefully with COVID restrictions lifting we will be able to engage with OVO volunteers more in future.”

The indicator used is the volunteering hours that could help charities meet anticipated outcomes. As 71% of charities have or will have experienced this, it is assumed that 71% of the volunteering hours have contributed to this outcome.

Table 76 Estimated volunteering hours that contributed to this outcome

Number of volunteering hours by OVO staff	1,988 hours
% of charities that have seen or think they will have seen this change	71%
Number of volunteering hours that could bring changes, from the perspectives of both OVO staff and charities	1,420 hours

Assuming if OVO volunteering did not happen, charities might need to resource in other ways, for example, hiring others or looking for other volunteers to conduct the work. The proxy chosen was the average hourly rate of an employee in the charity sector, at GBP 13<sup>92</sup>.

Table 77 Valuing “Charities meet their anticipated outcomes because of the help of OVO volunteers.

Indicator	Quantity	Financial proxy	Value in currency	Source of value
Volunteering hours that could help charities meet anticipated outcomes	1,420	Average hourly rate of an employee in the charity sector	GBP 13	The Guardian <sup>93</sup>

<sup>92</sup> The Guardian (2019). [Charity sector salary guide](#).

<sup>93</sup> The Guardian (2019). [Charity sector salary guide](#).

**Outcome: Charities meet their anticipated outcomes because of OVO’s grant funding.**

All of the charities believe this outcome has happened or would have happened, and OVO’s grant was able to help them accelerate their anticipated outcomes, as in these quotes:

- *“We would have needed to secure funding from other external sources and/or use our unrestricted income, thereby diverting it from our core costs.”*
- *“The OVO Gives Back programme has been the encouragement and an accelerated huge push to enable the next step in our project development. Without it, it probably would have taken us years to get to where we are/will be in the next few months/year to come.”*
- *“OVO Gives Back funding enabled us to extend the reach and impact of a project that we would have had to fund ourselves without their grant. This also allowed us to use our core funds for other work, allowing the charity to deliver more activity overall.”*
- *“The OVO grant we received in 2019 allowed us to run our term-long project, supporting 150 children to develop their literacy, confidence and perseverance.”*

A charity also said that the OVO grant application and allocation process were straightforward, as in this quote, *“The process of receiving the money was quick and mean that from being asked if we could use the funding to receiving was hardly any time at all.”*

The study thus used the estimated time saved to apply for OVO grants as an indicator. It is estimated that it takes charities 2 hours to apply for OVO grants and another 6 hours to complete the end of year report for OVO, which means a total of 8 hours were spent in the funding process. Research shows that on average, a charity spends 18 hours on a grant application<sup>94</sup> and another 40 hours on each grant reporting<sup>95</sup>, which amounts to 58 hours.

Table 78 Estimated hours saved

Estimated hours on each grant application and reporting by a charity	58 hours
Estimated hours on OVO grant application and reporting by a charity	8 hours
Total hours saved by a charity	50 hours
% of charities that have seen or think they will have seen this change	100%
Number of charities involved in OVO Gives Back in 2019-2020	16
Total hours saved	800 hours

Saving time in the process means the saved cost of employees’ salary. The average salary in charity sector is GBP 25,000<sup>96</sup>, which offers an hourly rate of around GBP 13.

Table 79 Valuing “Charities meet their anticipated outcomes because of OVO’s grant funding.”

Indicator	Quantity	Financial proxy	Value in currency	Source of value
Hours saved to apply for OVO	800	Average hourly rate of an	GBP 13	The Guardian <sup>97</sup>

<sup>94</sup> Telegraph (2019). [Charities are spending £1.1bn a year applying for grants - but 63per cent fail, researchers find.](#)

<sup>95</sup> [Charities spend 15.8 million hours reporting to funders - that's too much.](#)

<sup>96</sup> The Guardian (2019). [Charity sector salary guide.](#)

<sup>97</sup> The Guardian (2019). [Charity sector salary guide.](#)

grants rather than others		employee in the charity sector		
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## SROI analysis

### Overview

The SROI is analysed according to the inputs for OVO Gives Back by OVO Foundation and all outcome data gathered from stakeholders, including the quantity in the outcome indicators, duration of changes, deductions and monetary values. The social return ratio implies the potential value contributed by OVO Gives Back programme. The estimated figure is further tested in the sensitivity analysis.

Table 80 SROI for OVO Gives Back

Total investment	GBP 300,000.00
Total present outcomes value	GBP 530,307.27
Net present outcomes value	GBP 230,307.27
Social return on investment	1.77
Social return ratio	1:1.77

### Inputs

The main financial and non-financial inputs during the time scope of this analysis (2019 to 2020) are detailed below.

Table 81 Input to OVO Gives Back

Stakeholder	Type of contribution	Input	Value (GBP)
Staff volunteers	Time	In line with SROI standard practice, beneficiaries' time is not included in the analysis.	GBP 0.00
Funder (OVO Foundation)	Funding	Grants for the 16 charities.	GBP 300,000.00
Charities	Staff time	Staff time to support the volunteering.	Covered in the funding from OVO
Total input			GBP 300,000.00

### Deduction to valuation

#### Deadweight for outcomes

The combination of percentages of "This would have happened anyway" and "It didn't happen and/or will not happen" are used to calculate deadweight.

Table 82 Deadweight for OVO Gives Back

Stakeholder	Outcome	Deadweight
Staff	Staff feel more positive about working at OVO.	9%

	Staff feel inspired to volunteer again.	0%
	Other colleagues are inspired to volunteer.	18%
	Staff feel connected to my local community and/or the areas near my office.	9%
	OVO improves its relationship with the communities	9%
Charity	OVO volunteers have helped us meet our anticipated outcomes.	0%
	Charity partners use funding to meet their anticipated outcomes.	0%

### Displacement for outcomes

In the survey, staff volunteers were invited to share negative or unintended outcomes. Two people mentioned additional outcomes:

- *“It has all mainly been positive, the organising of the events have been great and well put together by reps. I think sometimes the charities are overwhelmed by the amount of volunteers who show up and so can run out of resources or things to do. I would definitely encourage more of these events in the future because it costs nothing for our time.”*
- *“A lot of the volunteering involves being in a big group and is very physical. This could be a deterrent to those with disabilities or who struggle in a busy and loud environment.”*

The study judges that the first comment as a partially negative change, as the comment includes both positive and negative views. Also, the negative view is based on the staff’s observation of the charities but not from the charities themselves. The second comment could be a negative change, as the volunteering opportunities could potentially discriminate against certain groups of people. Combining these two comments, 14% is used as displacement (1.5 out of 11 people; the first comment is regarded as 0.5, as it is both positive and negative.)

As for charities, no displacement is identified. All charities shared positive feedback. Some quotes from charities are:

- *“All changes have been positive. No negative outcomes whatsoever. Thank you OVO for your generosity at a difficult time for our Foodbank.”*
- *“No negative outcomes. My only wish is that we would have been able to accommodate volunteer support from OVO.”*
- *“All positive.”*
- *“There are no negative outcomes. In terms of the positive changes achieved- our mission was to increase our data on air pollution in different areas, raise awareness of air pollution among people and increase support for our petitions to lobby the government for change. As we engaged new campaigners and increased our data through the OVO grant, these changes are long-term.”*
- *“Yes, no negative ones. We would like to work more closely with OVO to hire people.”*

- “It has been a difficult two years and the OVO team has been very patient and understanding. It is and has been a very positive and unbelievable journey so far and we are looking forward to the road ahead.”

### Attribution for outcomes

For staff, two other factors are identified: (1) Ease of access due to transport in the local area; and (2) Plan Zero. The second factor is OVO’s comprehensive initiative to net zero carbon transition, so the contributor is still OVO. Therefore, only the first factor is considered as an external contributor. As 1 out of 11 people mentioned this factor, 9% (1/11) is used to deduct all outcomes related to staff, as this factor could influence the possibility and accessibility of volunteering.

As for charities, they mentioned some other contributors in the survey. The study counts the number of charities mentioning a contributor and calculates its percentage of total mentions. It is found that 38% of the mentions are towards other contributors. 38% is thus used for attribution.

Table 83 Contributors for OVO Gives Back

Type	Contributor	Number and % of participants mentioning this factor		
OVO	Mentioning the contribution of OVO or expressing there is no other factors	9	56%	63%
	Funding process	1	6%	
Charity itself	Tech platform to support frontline work	1	6%	38%
	Staff’s knowledge, skills and commitment	1	6%	
Other stakeholders	General public	1	6%	
	Community	1	6%	
	Other funders	1	6%	
	Partnership with other organisations	1	6%	

### Duration and drop-off

Both staff volunteers and charities shared the duration outcomes will last, which is used to calculated drop-off rate in

Table 84 Staff volunteers’ perception on the duration that the outcomes have lasted (N=11)

Outcomes	3 months	6 months	1 year	2 years	over 2 years	Weighted duration (years)
1. I feel more positive about working at OVO.	18%	18%	18%	0%	45%	1.45
2. I feel inspired to volunteer again.	9%	18%	9%	0%	64%	1.80
3. Other colleagues are inspired to volunteer.	45%	9%	9%	0%	36%	1.16

4. I feel connected to my local community and/or the areas near my office.	18%	27%	27%	0%	27%	1.14
5. My volunteering helps OVO's charity partners to meet their anticipated outcomes.	0%	36%	27%	9%	27%	1.32
6. I contributed to improving OVO's relationship with local communities.	18%	27%	9%	18%	27%	1.32

*Table 85 Charities' perception on the duration that the outcomes have lasted*

Outcomes	3 months	6 months	1 year	2 years	over 2 years	Weighted duration (years)
1. OVO volunteers have helped us meet our anticipated outcomes. (N=7)	18%	18%	18%	0%	45%	1.14
2. OVO funding has helped us meet our anticipated outcomes. (N=11)	9%	18%	9%	0%	64%	2.05

*Table 86 Drop-off rate*

Stakeholder	Outcome	After 1 year	After 2 years
Staff	Staff feel more positive about working at OVO.	55%	0%
	Staff feel inspired to volunteer again.	36%	0%
	Other colleagues are inspired to volunteer.	64%	0%
	Staff feel connected to my local community and/or the areas near my office.	73%	0%
	OVO Staff contribute to improving OVO's relationship with the communities.	55%	18%
Charity	Charities meet their anticipated outcomes because of the help of OVO volunteers.	86%	14%
	Charities meet their anticipated outcomes because of OVO's grant funding.	27%	9%

## Sensitivity analysis

The SROI is tested by considering six scenarios. **The sensitivity analysis shows a SROI range from GBP 1.56 to GBP 1.77.** The changes in deadweight, displacement and attribution could impact the SROI the most. It is suggested that the programme (1) continue to collect data about the experience of the changes by staff volunteers and charities; (2) conduct more direct consultation with staff volunteers and charities to understand whether there are negative changes that could cause displacement; (3) collect feedback from more staff volunteers to see whether there could be more contributing factors to the changes.

Table 87 Sensitivity overview for OVO Gives Back

Scenario	Sensitivity test and outcome tested	Adjustment	New SROI	Difference from baseline SROI
1	Increased deadweight by 10% for all outcomes, assuming some more changes would have happened anyway.	+10%	1.57	- 0.20
2	Increased displacement by 10% for all outcomes, assuming there could be more negative changes yet were not able to be identified in this study.	+10%	1.56	- 0.21
3	Increased attribution by 10% for all outcomes related to staff, assuming there could be some more factors not identified. Attribution to charity-related outcomes are not tested, as charities have mentioned much more other factors that could contribute to the changes.	+10%	1.58	- 0.19
4	Reduced the duration by 10% for all outcomes.	-10%	1.75	- 0.02
5	Adjusted the quantity for this outcome "Charities meet their anticipated outcomes because of OVO's grant funding." Assuming charities actually need to spend another day (8 hours) to fulfil OVO's funding process, the total hours saved would reduce from 800 to 672 hours.	from 800 to 672 hours	1.76	- 0.01

## Conclusion and recommendations

This forecast SROI assessment applies [The Seven Principles of Social Value](#) (Social Value International, 2018) and is based on stakeholder consultation, desk-based research and continual data collection conducted by OVO Foundation and the programme delivery teams. The study informs how the interventions have created a positive impact on the stakeholders and generates value for society, beyond the monetary contribution from OVO Foundation. For Project Jua, it is estimated that approximately GBP 28,402,921.36 social value will be created as a result of the programme, giving an indicative SROI ratio of 1:13.58. For Future Builders, GBP 4,974,600.19 social value could potentially be generated, or a SROI ratio of 1:5.28. As for OVO Gives Back, the programme could create GBP 602,956.71 social value and have a SROI ratio of 1:2.01. It is then calculated that the average SROI values of the three OVO programmes is GBP 10.19, based on dividing the sum of the combined impact values (i.e. GBP 33,980,478.26) by the sum of the combined input values (i.e. 3,333,693.00) of the three programmes. Alternatively stated, the SROI analysis demonstrates evidence that for every pound invested in the three charitable programmes by OVO Foundation, GBP 10.19 can be potentially returned to stakeholders or society at large in social value.

### For programme delivery

Through estimating the social value in each programme, the study has identified several suggestions to improve the programme.

#### Project Jua

When evaluating the material outcomes, it was found that some changes, compared to others, had not been experienced so widely by research participants though were believed to happen in the future. These changes include:

- More children and young people attend schools.
- More girls attend schools.
- Students perform better.
- More patients attend health clinics.
- Life-saving health equipment can be powered.
- My communities become more sustainable.

For those related to students, it is important for the programme to understand other underlying factors that could prevent children and young people in local communities to attend schools. Tailored support might also require for specific groups of students, such as girls, as their experience and roles at family might differ from boys.

For the changes at clinics, while the clinics have been able to serve more patients in the extended hours due to the availability of light, there were still clinics not witnessing the changes happen. Two clinics also reported that the current energy level was not sufficient to power certain life-saving health equipment. It is suggested that the programme provide additional support for these clinics, by approaches such as more frequent checks on energy stability, understanding their staff capacity and the deployment of support from project electricians.

As for the outcome related to environmental sustainability, it is understandable that such a change is not so tangible for individual stakeholders as it is related to the environment as a whole. Although the project is able to monitor energy consumption and saving through its systems, which could be used to inform the achievement of this outcome, it is recommended that the project communicate the importance of solar energy on environmental sustainability to local communities and stakeholders during the project's intervention in local schools and clinics.

### **Future Builders**

In the Future Builders programme, some outcomes expected by the programme team were later identified as not material after the consultation with young people. These outcomes were:

- Bring properties back into use
- Achieve qualifications
- Gain professional experience

“Bring properties back into use”, though not believed as important by young people, is a core element of the programme. While it might not be a change that young people could experience on their own, the programme delivery team could consider how they communicate the value of bringing properties back into use with young people, as young people are gaining skills and building their own places to live.

As for “achieve qualifications” and “gain professional experience”, these two outcomes have been regarded as important steppingstones for young people to sustain employment and potentially live independently in the future. Nevertheless, the young people did not recognise the importance of these as opposed to how they perceive other outcomes. It is important for the programme delivery team to assess how young people engage with activities related to employability and tune into young people to address their individual needs that can help contribute to longer-term outcomes.

Despite mostly positive reactions from young people living with their peers, some experienced difficulties living with others, while others felt their anxiety worsen if they were alone. The differences show the various needs of young people and the importance of supporting them in tailored approaches. It is recommended that the programme delivery team establish methods to understand the nuances among young people's needs.

### **OVO Gives Back**

Most of the anticipated outcomes in this programme were received well and agreed upon by stakeholders. One outcome that saw fewer changes was “other colleagues are inspired to volunteer”, with 9% of people didn't see or believe that it would happen. However, to roll out this volunteer programme more widely, it is important that colleagues could be motivated to participate. It is suggested that the programme team consider how they reach and communicate the programme to their staff members. Different approaches should be tested to inspire staff members' contribution back to the communities.

On the other hand, looking from the charities' perspectives, 29% of them didn't feel OVO volunteers had helped them meet their anticipated outcomes, with some of them overwhelmed by the number of volunteers joining at the same time. It is important for the programme team to review how they partner with charities and how the volunteer activities are planned, in order for the volunteering to add value rather than burdens on the charities.

That being said, the Covid-19 pandemic had disrupted the opportunities to volunteer in the communities. As nearly 60% of the charities still had experienced the value of OVO volunteers, it is suggested that OVO Foundation consider diverse ways to support charities and the communities they work with.

## **For evaluation**

This SROI study identified several areas where OVO Foundation and its partners can improve its evaluation and present the social value that the programme produces.

### **1. Measure social value regularly.**

Apply the methodology, evaluation framework and lessons learned from this SROI study to measure the outcomes of the programmes at regular intervals. This can help understand how the creation of social value has progressed over time and identify success factors and areas for improvement to adjust the programme delivery accordingly.

### **2. Integrate the indicators in the programmes' regular evaluation.**

The programmes evaluate their outcomes on a regular basis. It is suggested to integrate the indicators used in this SROI analysis or collect proxy data in the programmes' evaluation frameworks and timeframes. In this way, assumptions could be mitigated or avoided, and more rigorous data could be applied in future SROI studies. In addition, Project Jua will have baseline, midline and endline data to compare the social value created over time, so that actual results could be obtained to compare the value in the forecast SROI study. Having regular data is a good practice, and the study encourages applying this approach to the other programmes.

### **3. Continued stakeholder engagement.**

As the programmes have been involving stakeholders in evaluation, it is encouraged to continue engaging stakeholders both to collect outcome data and to understand how they value the changes. To establish the long-term social value created by the programmes, OVO Foundation should remain in touch with SROI assessment participants and repeat the engagement conducted in this analysis in the future. OVO Foundation should also consider expanding the reach of stakeholders involved in the SROI study, to improve evaluation rigor and indicate potential differences in outcomes. In the best case scenario, all stakeholders should be consulted and the participants involved should be representative in their groups. To better inform the representation of samples, it is suggested to research demographics of the stakeholder groups and to collect demographic data from participants in aspects such as gender, age, seniority in their organisations and socio-economic backgrounds.

#### **4. Reinforce data collection methods.**

One limitation of this study is not being able to investigate the potential difference in outcomes within one group of stakeholders. Several steps could be applied to address this gap in future studies: (1) Sample a representative group based on the demographic picture of the areas, as suggested in Point 3 above; (2) Collect both outcome data and demographic data from participants, compare the experience of outcomes with participants' characteristics and derive patterns; (3) Conduct some focus groups or interviews with participants who experience different extent of outcomes, in order to identify potential reasons for different experience or negative experience; (4) Administer another survey to people who share the same characteristics, to verify the reasons for negative experience; (5) Incorporate material negative outcomes in the impact map, or apply deduction for outcomes.

#### **5. Understand the different experiences for every outcome.**

Although the study consults stakeholders about their experience of every outcome, the different extent of experience could be better identified. For example, in the current survey, the participants could express if they have seen or experienced a certain outcome, but they could not report whether they experienced an outcome fully or partially. In addition, the potential negative experience of every outcome should be established. In this way, participants can not only share if an outcome 'didn't happen and/or will not happen', they could also report if they have actually experienced negative changes for that outcome. To address the above issues, revised surveys are suggested [in the appendices](#).

#### **6. Continued research on financial proxies.**

As discussed as an evaluation limitation in this section, the selection of proxy financial data would influence the social values generated. Although all the valuation methods have been verified with stakeholders, it is suggested that future studies continue to monitor the changes in proxy data (such as carbon pricing) and consult stakeholders on valuation (such as by verifying the values with more stakeholders, by conducting value games with stakeholders to identify new financial proxies.)

#### **7. Collect rigorous data on attribution, deadweight and displacement.**

This study has consulted stakeholders to consider the deduction in SROI values in terms of attribution, deadweight and displacement. However, the deduction value is mostly a general estimate that is applied to several outcomes. It is recommended that future studies identify the respective deduction value for every outcome, by consulting stakeholders on the three aspects (attribution, deadweight and displacement) for every outcome. The revised surveys suggested [in the appendices](#) allow the collection of more rigorous data on attribution, deadweight and displacement. In addition, future studies can consider including other organisations that contribute to the changes as stakeholders, consulting them on how the programmes might have impacted them positively and negatively and incorporating the changes in the SROI evaluation where appropriate. To further achieve rigour on discounting factors, future studies can also find reference from secondary sources, such as SROI reports in similar thematic areas, the research in the same geographical regions and other relevant economic evaluation projects. Secondary resources might help inform assumptions on the different discount factors depending on the programme and context.

# Appendices

## Workshop questions

- Based on the draft ToC, do you think it makes sense in the aspects below? Are there any missing points you'd like to add?
  - Inputs and ways to value inputs
  - Outputs and which stakeholders they are for
  - Outcomes and which stakeholders they are for
- What are some important stakeholders for the project?
- Are there any unintended outcomes?
- How are you collecting the data currently to share with OVO Foundation?
- What have changed in your organisation or communities due to OVO's partnership with you?
- Have you noticed changes that have occurred for other people?
- How would they value the outcomes?
- What else can we do to ensure that their voices are included?
- *Duration and drop-off*: how long does an intervention last for your beneficiaries? When does the impact drop off?
- *Deadweight*: what are the outcomes that would have happened anyway?
- *Displacement*: are there outcomes that have displaced other outcomes?
- *Attribution*: how much of the outcome was caused by contribution of other organisations or people? Who else is supporting you in this area? What percentage of the outcome is the result of your activity?

## Surveys

### OVO Foundation SROI survey for Project Jua – schools

Thank you for your time taking this anonymous survey. It aims to understand your experience with Project Jua. It will take you around 5-10 minutes to complete. (\*required question)

1. When did you first come into contact with Project Jua?\*

*Please put month, year. For example, August 2018.*

\_\_\_\_\_

2. What changes have you seen or experienced, (or do you think you will), because of Project Jua?

*Please put X on the options you choose.*

Changes	I have seen this	I think I will see this happen	This would have happened anyway	It didn't happen and/or will not happen
---------	------------------	--------------------------------	---------------------------------	---

I feel supported to do my job.				
More children and young people attend schools.				
More girls attend schools.				
Students attend schools more often.				
Students perform better.				
Local businesses generate more income.				
My communities become more sustainable.				

3. Did anyone/anything else contribute to the experience/change in the previous question?

4. Have all the changes been positive? If not, what have been the negative changes?

5. Can you rate how important these changes are for you?\*

*Please put X on the options you choose.*

Changes	not important	less important	so-so	quite important	very important
I feel supported to do my job.					
More children and young people attend schools.					
More girls attend schools.					
Students attend schools more often.					
Students perform better.					
Local businesses generate more income.					

My communities become more sustainable.					
Other changes: _____					

6. How long did the change last for (or do you think the change will last)?\*

*Please put X on the options you choose.*

Changes	3 months	6 months	1 year	2 years	over 2 years
I feel supported to do my job.					
More children and young people attend schools.					
More girls attend schools.					
Students attend schools more often.					
Students perform better.					
Local businesses generate more income.					
My communities become more sustainable.					
Other changes: _____					

Thank you for your time to share your thoughts!

### **OVO Foundation SROI survey for Project Jua – Clinic**

Thank you for your time taking this anonymous survey. It aims to understand your experience with Project Jua. It will take you around 5-10 minutes to complete. (\*required question)

1. When did you first come into contact with Project Jua?\*

*Please put month, year. For example, August 2018.*

2. What changes have you seen or experienced, (or do you think you will), because of Project Jua? *Please put X on the options you choose.*

Changes	I have seen this	I think I will see this happen	This would have happened anyway	It didn't happen and/or will not happen
I feel supported to do my job.				

More patients attend health clinics.				
Patients receive more support on healthcare.				
More lives are saved.				
The clinic has access to reliable and clean energy.				
The clinic saves costs on electricity.				
Life-saving health equipment can be powered.				
Local businesses generate more income.				
My communities become more sustainable.				

3. Did anyone/anything else contribute to the experience/change in the previous question?

4. Have all the changes been positive? If not, what have been the negative changes?

5. Can you rate how important these changes are for you?\*

*Please put X on the options you choose.*

Changes	not important	less important	so-so	quite important	very important
I feel supported to do my job.					
More patients attend health clinics.					
Patients receive more support on healthcare.					
More lives are saved.					
The clinic has access to reliable and clean energy.					

The clinic saves costs on electricity.					
Life-saving health equipment can be powered.					
Local businesses generate more income.					
My communities become more sustainable.					
Other changes: _____					

6. How long did the change last for (or do you think the change will last)?\*

*Please put X on the options you choose.*

Changes	3 months	6 months	1 year	2 years	over 2 years
I feel supported to do my job.					
More patients attend health clinics.					
Patients receive more support on healthcare.					
More lives are saved.					
The clinic has access to reliable and clean energy.					
The clinic saves costs on electricity.					
Life-saving health equipment can be powered.					
Local businesses generate more income.					
My communities become more sustainable.					
Other changes: _____					

Thank you for your time to share your thoughts!

### **OVO Foundation SROI survey for Future Builders**

Thank you for your time taking this anonymous survey. It aims to understand your experience with the Future Builders programme. It will take you around 5-10 minutes to complete. (\*required question)

1. When did you start to take part in the Future Builders programme?\*

*Please put month, year. For example, August 2019.*

\_\_\_\_\_

2. What changes did you experience, (or do you think you will), because of the Future Builders programme?\*

Please put X on the options you choose.

Changes	I experienced this	I think I will experience this	This would have happened to me anyway	It didn't happen and/or will not happen
Make progress with your needs				
Ready for education, employment, and training				
Achieve qualifications				
Gain professional experience				
Maintain tenancy				
Bring properties back into use				
Save money				
Live in supported and affordable housing				
Grow and sustain your wellbeing				
Sustain employment				
Move on to positive accommodation				
Live independently				

3. Did anyone/anything else help you experience the changes in the previous question?

4. Have all the changes been positive? If not, what have been the negative changes?

5. Can you rate how important these changes are for you?\*

*Please put X on the options you choose.*

Changes	<b>not importan t</b>	<b>less importan t</b>	<b>so-so</b>	<b>quite importan t</b>	<b>very importan t</b>
Make progress with your needs					
Ready for education, employment, and training					
Achieve qualifications					
Gain professional experience					
Maintain tenancy					
Bring properties back into use					
Save money					
Live in supported and affordable housing					
Grow and sustain your wellbeing					
Sustain employment					
Move on to positive accommodation					
Live independently					
Other changes: _____ _____					

6. How long did the change last for (or do you think the change will last)?\*

Please put X on the options you choose.

Changes	3 months	6 months	1 year	2 years	over 2 years
Make progress with your needs					
Become ready for education, employment, and training					
Achieve qualifications					
Gain professional experience					
Maintain tenancy					
Bring properties back into use					
Save money					
Live in supported and affordable housing					
Grow and sustain your wellbeing					
Sustain employment					
Move on to positive accommodation					
Live independently					
Other changes: _____ _____ _____					

Thank you for your time to share your experience!

### **OVO Foundation SROI survey for OVO Gives Back – Staff**

Thank you for your time taking this survey. It aims to understand your experience in volunteering with an OVO Gives Back charity partner. It will take you around 5-10 minutes to complete. (\*required question)

1. Please provide your email:

\_\_\_\_\_

2. How many hours or days have you spent volunteering for an OVO Gives Back charity partner?\* (Please specify whether you are answering in hours or days)

\_\_\_\_\_

3. Have you contributed other resources to an OVO Gives Back charity partner? (For example, additional volunteering time with the charity; a donation to the charity)\*

Yes/ No

4. If yes and regardless of whether it was a financial donation or not, how much would you value your contribution financially (ie. in £)?

\_\_\_\_\_

5. What changes did you experience (or do you think you will) from volunteering with an OVO Gives Back charity partner?\*

*Please put X on the options you choose.*

Changes	I experienced this	I think I will experience this	This would have happened to me anyway	It didn't happen and/or will not happen
I feel more positive about working at OVO.				
I feel inspired to volunteer again.				
Other colleagues are inspired to volunteer.				
I feel connected to my local community and/or the areas near my office.				
My volunteering helps OVO's charity partners to meet their anticipated outcomes.				
I contributed to improving OVO's relationship with local communities.				

6. Do you think the above changes would still have happened if the OVO Gives Back programme didn't exist? What resources might be required to achieve the same changes?

7. Are there other factors that contributed to the above changes?

--

8. Can you rate how important the following changes are for you?\*

*Please put X on the options you choose.*

Changes	not important	not important	so-so	quite important	very important
I feel more positive about working at OVO.					
I feel inspired to volunteer again.					
Other colleagues are inspired to volunteer.					
I feel connected to my local community and/or the areas near my office.					
My volunteering helps OVO's charity partners to meet their anticipated outcomes.					
I contributed to improving OVO's relationship with local communities.					

9. How long did the change last for (or do you think the change will last)?\*

*Please put X on the options you choose.*

Changes	3 months	6 months	1 year	2 years	over 2 years
I feel more positive about working at OVO.					
I feel inspired to volunteer again.					
Other colleagues are inspired to volunteer.					
I feel connected to my local community and/or the areas near my office.					
My volunteering helps OVO's charity partners to meet their anticipated outcomes.					
I contributed to improving OVO's relationship with local communities.					

10. Have all the changes been positive? Are there any negative outcomes from OVO Gives Back for you or any other stakeholders?

Thank you for your time to share your experience!

**OVO Foundation SROI survey for OVO Gives Back – Charity partners**

Thank you for your time taking this survey. It aims to understand your experience with the OVO Gives Back programme. It will take you around 5-10 minutes to complete. (\*required question)

1. What is the name of your organisation?

---

2. What do you contribute to OVO Gives Back in terms of resources, staff time, coordination and support? How much would you value it?

---

3. What changes did you experience, (or do you think you will), because of the OVO Gives Back?\*

*Please put X on the options you choose.*

Changes	I experienced this	I think I will experience this	This would have happened to me anyway	It didn't happen and/or will not happen
OVO volunteers have helped us meet our anticipated outcomes.				
OVO funding has helped us meet our anticipated outcomes.				

4. If there is no OVO Gives Back programme, do you think it is still possible that the above changes will happen? What resources would be required to achieve the same changes?

5. Are there other factors that contribute to the above changes?

6. Have all the changes been positive? Are there any negative outcomes from OVO Gives Back for your organisation or any other stakeholders?

7. Can you rate how important these changes are for you?\*

*Please put X on the options you choose.*

Changes	<b>not important</b>	<b>less important</b>	<b>so-so</b>	<b>quite important</b>	<b>very important</b>
OVO volunteers have helped us meet our anticipated outcomes.					
OVO funding has helped us meet our anticipated outcomes.					

8. How long did the change last for (or do you think the change will last)?\*

*Please put X on the options you choose.*

Changes	<b>3 months</b>	<b>6 months</b>	<b>1 year</b>	<b>2 years</b>	<b>over 2 years</b>
OVO volunteers have helped us meet our anticipated outcomes.					
OVO funding has helped us meet our anticipated outcomes.					

Thank you for your time to share your experience!

# Infographics for verification with stakeholders

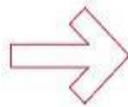
Project Jua – With the teachers:

## SROI

### Project Jua



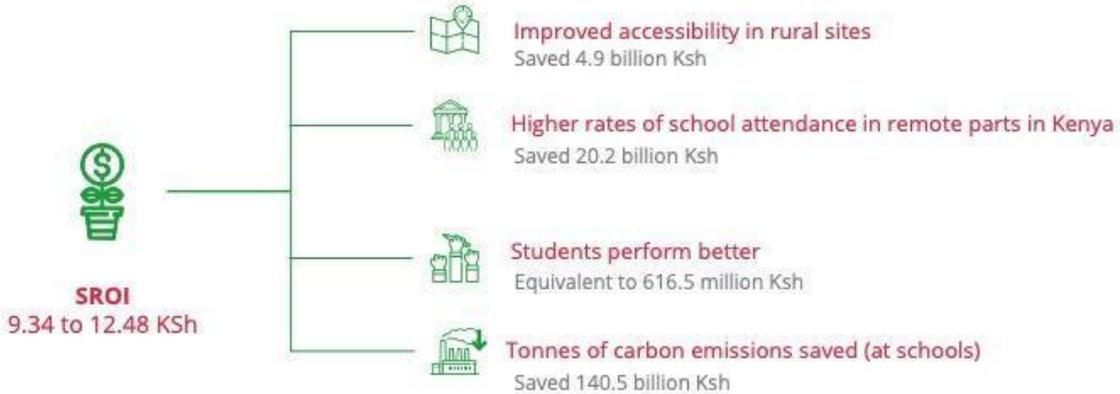
1 KSh



9.34 to 12.48 KSh

## SROI

### In schools



## SROI



#### Improved accessibility in rural sites



Project Jua saved 73% of the costs schools paid for unreliable grid energy = 699 million Ksh



Project Jua saved 87,600 hours commuting between schools and electrified sites = 13.1 million KSh



#### Students perform better



1 billion KSh was invested in schools cable infrastructure.



78% of teachers have seen students perform better following Project Jua



#### Higher rates of school attendance in remote parts in Kenya



78% of teachers saw an increase in school attendance



2 more hours at school saves family members 8,449,309 hours spent with students at home =20.2 billion Ksh



#### Tonnes of carbon emissions saved (at schools)



Solar panels allowed schools to save 631,635.44 tonnes of carbon = 140.5 billion KSh

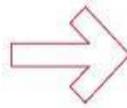
Project Jua – With the health professionals:

**SROI**

**Project Jua**



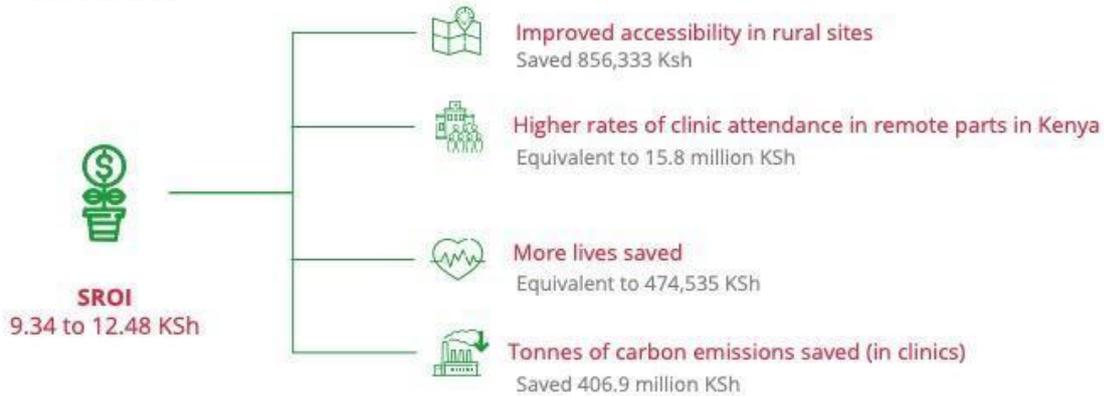
1 KSh



9.34 to 12.48 KSh

**SROI**

**In clinics**



**SROI**



**Improved accessibility in rural sites**



Project Jua saved 71% of the costs clinics paid for unreliable grid energy = 470,393 Ksh



Project Jua saved 2,400 hours of commuting between clinics and electrified sites = 385,940 KSh



**More lives saved**



41 children received appropriate medical treatment following Project Jua, sparing them from ill health or death = 474,535 KSh



**Higher rates of clinic attendance in remote parts in Kenya**



88% of participants saw an increase in capacity



17,453 more patients were served following Project Jua = 15.8 million KSh

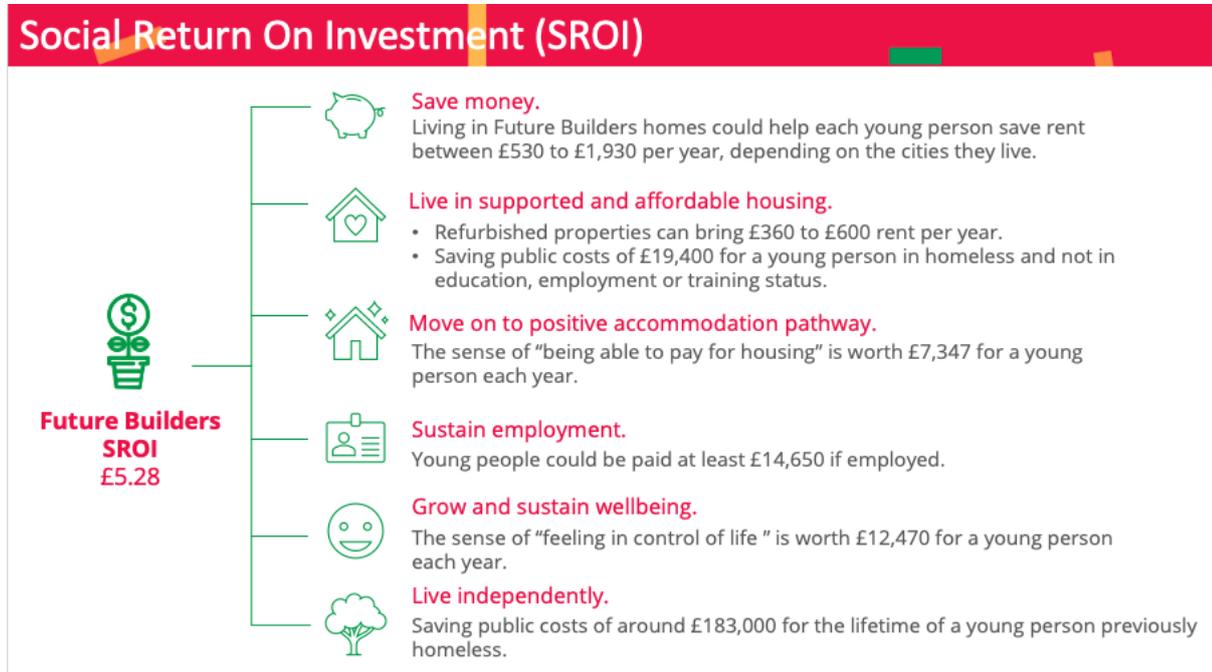
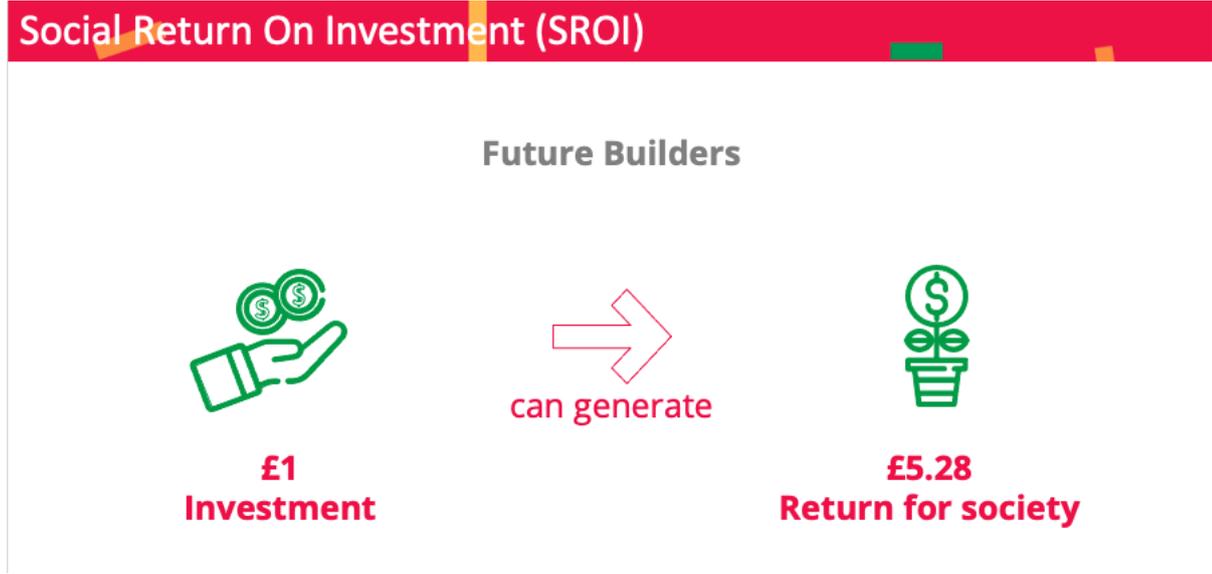


**Tonnes of carbon emissions saved (in clinics)**



Solar panels allowed clinics to save 197,326.66 tonnes of carbon = 406.9 million KSh

Future Builders – With young people:



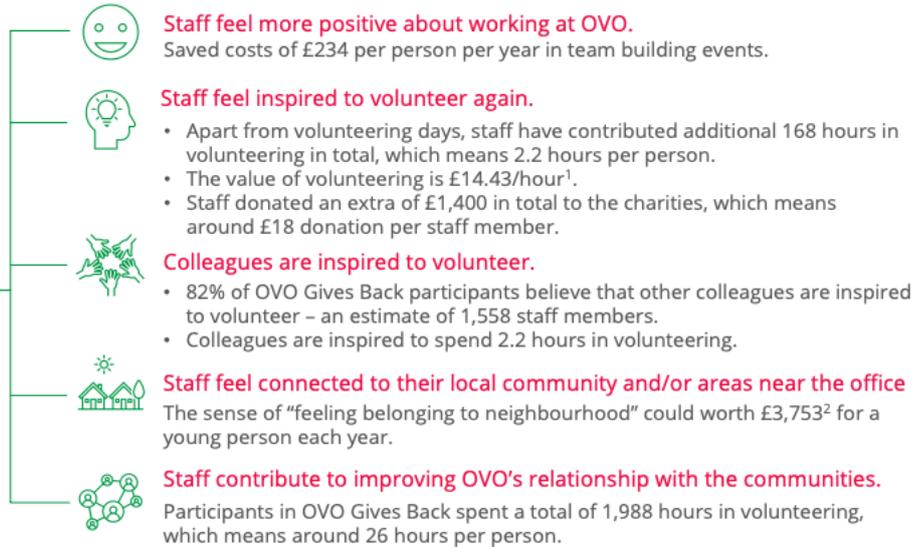
OVO Gives Back – With staff:



## Social Return On Investment (SROI)

OVO staff

**OVO Gives Back**  
SROI  
£2.01



<sup>1</sup> Office for National Statistics (2017). [Billion pound loss in volunteering effort.](#)

<sup>2</sup> HACT (2014). [Measuring the Social Impact of Community Investment: A Guide to using the Wellbeing Valuation Approach.](#)

OVO Gives Back – With charities:

## Social Return On Investment (SROI)

### OVO Gives Back



**£1**  
**Investment**



**£2.01**  
**Return for society**

# Social Return On Investment (SROI)

Charity partners



<sup>1</sup>The Guardian (2019). [Charity sector salary guide](#).

<sup>2</sup>Telegraph (2019). [Charities are spending £1.1bn a year applying for grants - but 63per cent fail - researchers find](#).

<sup>3</sup>[Charities spend 15.8 million hours reporting to funders - that's too much](#).

## Full sources of data analysed

Project Jua:

- Project Jua needs assessment data (November 2019)
- Project Jua implementation phase (May 2019-December 2020) report (January 2021)
- SROI survey to schools
- SROI survey to health clinics
- Students' video interview recordings
- Health professionals' video interview recordings
- Workshop feedback with OVO Foundation, Energy4Impact and the project's research partner at Imperial College London

Future Builders:

- Future Builders quarterly reporting
- SROI survey to young people
- Workshop feedback with OVO Foundation and the charity partners

OVO Gives Back:

- OVO Gives Back reporting
- SROI survey to staff volunteers
- SROI survey to charities
- Workshop feedback with OVO Foundation, OVO staff volunteers and the charity partners

## Surveys suggested for future studies

### OVO Foundation SROI survey for Project Jua – schools (teachers)

Thank you for your time taking this anonymous survey. It aims to understand your experience with Project Jua. It will take you around 10 minutes to complete.

1. What is your gender?

- Male
- Female
- Non-binary
- Prefer not to say

2. How long have you been working as a teacher?

\_\_\_\_\_

3. How long have you been working at this school?

\_\_\_\_\_

4. When did you first come into contact with Project Jua?

*Please put month, year. For example, August 2018.*

\_\_\_\_\_

5. Since the start of Project Jua, what do you feel about the following statement?

*Please put X on the options you choose.*

Statement	Much more	A little more	The same	A little less	Much less
I feel supported to do my job.					
I save time commuting between schools and electrified sites.					
Children and young people attend schools.					
Girls attend schools.					
Students attend schools often.					
Students perform better.					
My communities become sustainable.					

6. Following the options which you chose above in Question 5, to what extent do you think Project Jua contributed to this change?

Please choose an option. For example, in Question 5, if you chose 'much more' for the statement 'I feel supported to do my job'. To what extent do you think Project Jua contributed to this change?

Statement	The project is the only thing that caused the change.	The project contributed to the change significantly.	Half of the change is due to the project.	The project contributed to the change a little.	The project has nothing to do with the change.
I feel supported to do my job.					
I save time commuting between schools and electrified sites.					
Children and young people attend schools.					
Girls attend schools.					
Students attend schools often.					
Students perform better.					
My communities become sustainable.					

7. Following the options which you chose above in Question 5, to what extent do you think the change would have happened anyway?

Please choose a percentage.

Statement	100%	80%	50%	30%	0%
	This change would have happened anyway. Project Jua didn't contribute to the change.	It's 80% likely that the change would have happened anyway, even without Project Jua.	It's 50% likely that the change would have happened anyway, even without Project Jua.	It's 30% likely that the change would have happened anyway, even without Project Jua.	The change would not have happened if Project Jua didn't exist.
I feel supported to do my job.					
I save time commuting between schools and electrified sites.					
Children and young people attend schools.					
Girls attend schools.					
Students attend schools often.					
Students perform better.					

My communities become sustainable.					
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8. In addition to Project Jua, who do you think have also contributed to the changes?

*Please write down other contributors, if any.*

Statement	Other contributors
I feel supported to do my job.	
I save time commuting between schools and electrified sites.	
Children and young people attend schools.	
Girls attend schools.	
Students attend schools often.	
Students perform better.	
My communities become sustainable.	

9. Can you rate how important these changes are for you?

*Please put X on the options you choose.*

Statement	not important	less important	so-so	quite important	very important
I feel supported to do my job.					
I save time commuting between schools and electrified sites.					
Children and young people attend schools.					
Girls attend schools.					
Students attend schools often.					
Students perform better.					
My communities become sustainable.					

10. How long did the change last for (or do you think the change will last)?

*Please put X on the options you choose.*

Statement	3 months	6 months	1 year	2 years	over 2 years

I feel supported to do my job.					
I save time commuting between schools and electrified sites.					
Children and young people attend schools.					
Girls attend schools.					
Students attend schools often.					
Students perform better.					
My communities become sustainable.					

11. Do you think Project Jua ‘displaced’ any activities? That is, something good did not happen because of Project Jua, or something bad happened because of Project Jua?

12. Following Question 11, to what extent do you think Project Jua is responsible for the ‘displacement’?

Thank you for your time to share your thoughts!

**OVO Foundation SROI survey for Project Jua – schools (students)**

Thank you for your time taking this survey. It wants to know more about your experience with Project Jua (the project that provides power to the school by solar panels). It will take you around 10 minutes to complete.

1. Do you know Project Jua (the project that provides power to the school by solar panels)?
  - Yes
  - No
  - I am not sure.
  
2. What is your gender?

- I am a girl (female).
- I am a boy (male).
- I don't want to be identified as either a girl (female) or a boy (male).
- I don't want to share this information.

3. What kind of school are you studying at?

- Primary school
- Secondary school

4. Which county do you live in?

\_\_\_\_\_

5. How long does it take for you to go from your home to the school?

\_\_\_\_\_

6. Since the start of Project Jua (or since the school has reliable power by solar panels), what do you feel about the following statement?

*Please put X on the options you choose.*

Statement	Much more	A little more	The same	A little less	Much less
I attend school often.					
I can focus on my study.					
I can study at night.					
I feel supported on my study.					
I perform better at my study.					
I feel more secured at school.					
My parents have time on their own, when I am studying at school.					

7. Following the options which you chose above in Question 6, how much do you think Project Jua (or reliable power provided by solar panels) contributed to this change?

*Please choose an option. For example, in Question 6, if you chose 'much more' for the statement 'I attend school often.' How much do you think Project Jua (having reliable power at school) contributed to this change?*

Statement	The project is the only thing that caused the change.	The project contributed to the change a lot.	Half of the change is due to the project.	The project contributed to the change a little.	The project has nothing to do with the change.
I attend school often.					

I can focus on my study.					
I can study at night.					
I feel supported on my study.					
I perform better at my study.					
I feel more secured at school.					
My parents have time on their own, when I am studying at school.					

8. Following the options which you chose above in Question 6, how much do you think the change would have happened anyway? In other words, how much do you think the change will happen, no matter the school has reliable power by solar panels or not?

*Please choose a percentage.*

	100%	80%	50%	30%	0%
Statement	This change would have happened anyway. Project Jua didn't contribute to the change.	It's 80% likely that the change would have happened anyway, even without Project Jua.	It's 50% likely that the change would have happened anyway, even without Project Jua.	It's 30% likely that the change would have happened anyway, even without Project Jua.	The change would not have happened if Project Jua didn't exist.
I attend school often.					
I can focus on my study.					
I can study at night.					
I feel supported on my study.					
I perform better at my study.					
I feel more secured at school.					
My parents have time on their own, when I am studying at school.					

9. In addition to Project Jua (or having reliable power at school), who do you think have also contributed to the changes?

*Please write down other contributors, if any.*

Statement	Other people that contribute to the change
I attend school often.	
I can focus on my study.	
I can study at night.	
I feel supported on my study.	
I perform better at my study.	
I feel more secured at school.	
My parents have time on their own, when I am studying at school.	

10. Can you rate how important these changes are for you?

*Please put X on the options you choose.*

Statement	not important	less important	so-so	quite important	very important
I attend school often.					
I can focus on my study.					
I can study at night.					
I feel supported on my study.					
I perform better at my study.					
I feel more secured at school.					
My parents have time on their own, when I am studying at school.					

11. How long did the change last for (or do you think the change will last)?

*Please put X on the options you choose.*

Statement	3 months	6 months	1 year	2 years	over 2 years
I attend school often.					
I can focus on my study.					
I can study at night.					

I feel supported on my study.					
I perform better at my study.					
I feel more secured at school.					
My parents have time on their own, when I am studying at school.					

12. Did something good not happen because of Project Jua (having reliable power at school by solar panels)? Or something bad happened because of Project Jua (having reliable power at school by solar panels)?

13. Following Question 12, how much do you think Project Jua (having reliable power at school by solar panels) is responsible for it?

Thank you for your time to share your thoughts!

**OVO Foundation SROI survey for Project Jua – clinics (health professionals)**

Thank you for your time taking this anonymous survey. It aims to understand your experience with Project Jua. It will take you around 10 minutes to complete.

1. What is your gender?

- Male
- Female
- Non-binary
- Prefer not to say

2. How long have you been working as a health professional?

\_\_\_\_\_

3. How long have you been working at this clinic?

\_\_\_\_\_

4. When did you first come into contact with Project Jua?

*Please put month, year. For example, August 2018.*

\_\_\_\_\_

5. Since the start of Project Jua, what do you feel about the following statement?

*Please put X on the options you choose.*

Statement	Much more	A little more	The same	A little less	Much less
I feel supported to do my job.					
Patients attend health clinics.					
Patients receive support on healthcare.					
Lives are saved.					
The clinic has access to reliable and clean energy.					
The clinic saves costs on electricity.					
Life-saving health equipment can be powered.					
My communities become sustainable.					

6. Following the options which you chose above in Question 5, to what extent do you think Project Jua contributed to this change?

*Please choose an option. For example, in Question 5, if you chose ‘much more’ for the statement ‘I feel supported to do my job’. To what extent do you think Project Jua contributed to this change?*

Statement	The project is the only thing that caused the change.	The project contributed to the change significantly.	Half of the change is due to the project.	The project contributed to the change a little.	The project has nothing to do with the change.
I feel supported to do my job.					
Patients attend health clinics.					
Patients receive support on healthcare.					
Lives are saved.					
The clinic has access to reliable and clean energy.					
The clinic saves costs on electricity.					
Life-saving health equipment can be powered.					
My communities become sustainable.					

7. Following the options which you chose above in Question 5, to what extent do you think the change would have happened anyway?

*Please choose a percentage.*

Statement	100%	80%	50%	30%	0%
	This change would have happened anyway. Project Jua didn't contribute to the change.	It's 80% likely that the change would have happened anyway, even without Project Jua.	It's 50% likely that the change would have happened anyway, even without Project Jua.	It's 30% likely that the change would have happened anyway, even without Project Jua.	The change would not have happened if Project Jua didn't exist.
I feel supported to do my job.					
Patients attend health clinics.					
Patients receive support on healthcare.					
Lives are saved.					
The clinic has access to reliable and clean energy.					
The clinic saves costs on electricity.					

Life-saving health equipment can be powered.					
My communities become sustainable.					

8. In addition to Project Jua, who do you think have also contributed to the changes?

*Please write down other contributors, if any.*

Statement	Other contributors
I feel supported to do my job.	
Patients attend health clinics.	
Patients receive support on healthcare.	
Lives are saved.	
The clinic has access to reliable and clean energy.	
The clinic saves costs on electricity.	
Life-saving health equipment can be powered.	
My communities become sustainable.	

9. Can you rate how important these changes are for you?

*Please put X on the options you choose.*

Statement	not important	less important	so-so	quite important	very important
I feel supported to do my job.					
Patients attend health clinics.					
Patients receive support on healthcare.					
Lives are saved.					
The clinic has access to reliable and clean energy.					
The clinic saves costs on electricity.					
Life-saving health equipment can be powered.					
My communities become sustainable.					

10. How long did the change last for (or do you think the change will last)?

*Please put X on the options you choose.*

Statement	3 months	6 months	1 year	2 years	over 2 years
I feel supported to do my job.					
Patients attend health clinics.					
Patients receive support on healthcare.					
Lives are saved.					
The clinic has access to reliable and clean energy.					
The clinic saves costs on electricity.					
Life-saving health equipment can be powered.					
My communities become sustainable.					

11. Do you think Project Jua ‘displaced’ any activities? That is, something good did not happen because of Project Jua, or something bad happened because of Project Jua?

12. Following Question 11, to what extent do you think Project Jua is responsible for the ‘displacement’?

Thank you for your time to share your thoughts!

**OVO Foundation SROI survey for Project Jua – clinics (patients)**

Thank you for your time taking this survey. It wants to know more about your experience with Project Jua (the project that provides power to the clinic by solar panels). It will take you around 10 minutes to complete.

1. Do you know Project Jua (the project that provides power to the clinic by solar panels)?
  - Yes
  - No
  - I am not sure.
  
2. What is your gender?

- Male
- Female
- Non-binary
- Prefer not to say

3. Which county do you live in?

\_\_\_\_\_

4. How long does it take for you to go from your home to the clinic?

\_\_\_\_\_

5. Since the start of Project Jua, what do you feel about the following statement?

*Please put X on the options you choose.*

Statement	Much more	A little more	The same	A little less	Much less
I have access to the health clinic.					
People have access to the health clinic.					
I receive appropriate treatment at the health clinic.					
I can access the health clinic at night.					
I feel supported for healthcare.					
Lives are saved.					
My communities become sustainable.					

6. Following the options which you chose above in Question 5, how much do you think Project Jua contributed to this change?

*Please choose an option. For example, in Question 5, if you chose 'much more' for the statement 'I have access to the health clinic.' How much do you think Project Jua contributed to this change?*

Statement	The project is the only thing that caused the change.	The project contributed to the change a lot.	Half of the change is due to the project.	The project contributed to the change a little.	The project has nothing to do with the change.
I have access to the health clinic.					
People have access to the health clinic.					

I receive appropriate treatment at the health clinic.					
I can access the health clinic at night.					
I feel supported for healthcare.					
Lives are saved.					
My communities become sustainable.					

7. Following the options which you chose above in Question 5, how much do you think the change would have happened anyway? In other words, how much do you think the change will happen, no matter the clinic has reliable power by solar panels or not?

*Please choose a percentage.*

	100%	80%	50%	30%	0%
Statement	This change would have happened anyway. Project Jua didn't contribute to the change.	It's 80% likely that the change would have happened anyway, even without Project Jua.	It's 50% likely that the change would have happened anyway, even without Project Jua.	It's 30% likely that the change would have happened anyway, even without Project Jua.	The change would not have happened if Project Jua didn't exist.
I have access to the health clinic.					
People have access to the health clinic.					
I receive appropriate treatment at the health clinic.					
I can access the health clinic at night.					
I feel supported for healthcare.					
Lives are saved.					
My communities become sustainable.					

8. In addition to Project Jua, who do you think have also contributed to the changes?

*Please write down other contributors, if any.*

Statement	Other people that contribute to the change
I have access to the health clinic.	
People have access to the health clinic.	

I receive appropriate treatment at the health clinic.	
I can access the health clinic at night.	
I feel supported for healthcare.	
Lives are saved.	
My communities become sustainable.	

9. Can you rate how important these changes are for you?

*Please put X on the options you choose.*

Statement	not important	less important	so-so	quite important	very important
I have access to the health clinic.					
People have access to the health clinic.					
I receive appropriate treatment at the health clinic.					
I can access the health clinic at night.					
I feel supported for healthcare.					
Lives are saved.					
My communities become sustainable.					

10. How long did the change last for (or do you think the change will last)?

*Please put X on the options you choose.*

Statement	3 months	6 months	1 year	2 years	over 2 years
I have access to the health clinic.					
People have access to the health clinic.					
I receive appropriate treatment at the health clinic.					
I can access the health clinic at night.					
I feel supported for healthcare.					

Lives are saved.					
My communities become sustainable.					

11. Did something good not happen because of Project Jua (having reliable power at the clinic by solar panels)? Or something bad happened because of Project Jua (having reliable power at the clinic by solar panels)?

12. Following Question 11, how much do you think Project Jua (having reliable power at the clinic by solar panels) is responsible for it?

Thank you for your time to share your thoughts!

### **OVO Foundation SROI survey for Future Builders - young people**

Thank you for your time taking this anonymous survey. It aims to understand your experience with the Future Builders programme. It will take you around 5-10 minutes to complete.

1. What is your gender?

- Male
- Female
- Non-binary
- Prefer not to say

2. How old are you?

\_\_\_\_\_

3. When did you start to take part in the Future Builders programme?\*

*Please put month, year. For example, August 2019.*

\_\_\_\_\_

4. Since you joined the Future Builders programme, what do you feel about the following statement?

Please put X on the options you choose.

Statement	Much more	A little more	The same	A little less	Much less
Make progress with my needs					
Ready for education, employment, and training					
Achieve qualifications					
Gain professional experience					
Maintain tenancy					
Bring properties back into use					
Save money					
Feel supported in the affordable housing					
Grow and sustain my wellbeing					
Sustain employment					
Move on to positive accommodation					
Live independently					
Increase earning potential for my future					

5. Following the options which you chose above in Question 4, how much do you think the Future Builders programme contributed to this change?

Please choose an option. For example, in Question 4, if you chose 'much more' for the statement 'Make progress with my needs.' How much do you think the Future Builders programme contributed to this change?

Statement	The programme is the only thing that caused the change.	The programme contributed to the change a lot.	Half of the change is due to the programme.	The programme contributed to the change a little.	The programme has nothing to do with the change.
Make progress with my needs					
Ready for education, employment, and training					
Achieve qualifications					

Gain professional experience					
Maintain tenancy					
Bring properties back into use					
Save money					
Feel supported in the affordable housing					
Grow and sustain my wellbeing					
Sustain employment					
Move on to positive accommodation					
Live independently					
Increase earning potential for my future					

6. Following the options which you chose above in Question 4, how much do you think the change would have happened anyway? In other words, how much do you think the change will happen, no matter if you joined the Future Builders programme or not?

*Please choose a percentage.*

	100%	80%	50%	30%	0%
Statement	This change would have happened anyway. The programme didn't contribute to the change.	It's 80% likely that the change would have happened anyway, even without the programme.	It's 50% likely that the change would have happened anyway, even without the programme.	It's 30% likely that the change would have happened anyway, even without the programme.	The change would not have happened if the programme didn't exist.
Make progress with my needs					
Ready for education, employment, and training					
Achieve qualifications					

Gain professional experience					
Maintain tenancy					
Bring properties back into use					
Save money					
Feel supported in the affordable housing					
Grow and sustain my wellbeing					
Sustain employment					
Move on to positive accommodation					
Live independently					
Increase earning potential for my future					

7. In addition to Future Builders, who do you think have also contributed to the changes?

*Please write down other contributors, if any.*

Statement	Other people that contribute to the change
Make progress with my needs	
Ready for education, employment, and training	
Achieve qualifications	
Gain professional experience	
Maintain tenancy	
Bring properties back into use	
Save money	
Feel supported in the affordable housing	

Grow and sustain my wellbeing	
Sustain employment	
Move on to positive accommodation	
Live independently	
Increase earning potential for my future	

8. Can you rate how important these changes are for you?

*Please put X on the options you choose.*

Statement	not important	less important	so-so	quite important	very important
Make progress with my needs					
Ready for education, employment, and training					
Achieve qualifications					
Gain professional experience					
Maintain tenancy					
Bring properties back into use					
Save money					
Feel supported in the affordable housing					
Grow and sustain my wellbeing					
Sustain employment					
Move on to positive accommodation					
Live independently					
Increase earning potential for my future					

9. How long did the change last for (or do you think the change will last)?

*Please put X on the options you choose.*

Statement	3 months	6 months	1 year	2 years	over 2 years
Make progress with my needs					
Ready for education, employment, and training					

Achieve qualifications					
Gain professional experience					
Maintain tenancy					
Bring properties back into use					
Save money					
Feel supported in the affordable housing					
Grow and sustain my wellbeing					
Sustain employment					
Move on to positive accommodation					
Live independently					
Increase earning potential for my future					

10. Did something good not happen because of the Future Builders programme? Or something bad happened because of the Future Builders programme?

11. Following Question 11, how much do you think the Future Builders programme is responsible for it?

*Please provide a rough percentage, if possible.*

Thank you for your time to share your thoughts!

**OVO Foundation SROI survey for OVO Gives Back – Staff volunteers**

Thank you for your time taking this survey. It aims to understand your experience in volunteering with an OVO Gives Back charity partner. It will take you around 5-10 minutes to complete.

1. Please provide your email:

\_\_\_\_\_

2. What is your gender?

- Male
- Female
- Non-binary
- Prefer not to say

3. How old are you?

\_\_\_\_\_

4. How long have you been working with OVO?

\_\_\_\_\_

5. How many hours or days have you spent volunteering for an OVO Gives Back charity partner?\* (*Please specify whether you are answering in hours or days*)

\_\_\_\_\_

6. Have you contributed other resources to an OVO Gives Back charity partner? (For example, additional volunteering time with the charity; a donation to the charity)

Yes/ No

7. If yes and regardless of whether it was a financial donation or not, how much would you value your contribution financially (ie. in £)?

\_\_\_\_\_

8. Since you volunteered to an OVO Gives Back charity partner, what do you feel about the following statement?

*Please put X on the options you choose.*

Statement	Much more	A little more	The same	A little less	Much less
I feel more positive about working at OVO.					
I feel inspired to volunteer again.					
I feel connected to my local community and/or the areas near my office.					
I feel contributing to improving OVO's relationship with the communities.					

9. Following the options which you chose above in Question 8, how much do you think the OVO Gives Back programme contributed to this change?

*Please choose an option. For example, in Question 8, if you chose 'much more' for the statement 'I feel more positive about working at OVO.' How much do you think the OVO Gives Back programme contributed to this change?*

Statement	The programme is the only thing that caused the change.	The programme contributed to the change a lot.	Half of the change is due to the programme.	The programme contributed to the change a little.	The programme has nothing to do with the change.
I feel more positive about working at OVO.					
I feel inspired to volunteer again.					
I feel connected to my local community and/or the areas near my office.					
I feel contributing to improving OVO's relationship with the communities.					

10. Following the options which you chose above in Question 8, how much do you think the change would have happened anyway? In other words, how much do you think the change will happen, no matter if you joined the OVO Gives Back programme or not?

*Please choose a percentage.*

Statement	100%	80%	50%	30%	0%
	This change would have happened anyway. The programme didn't contribute to the change.	It's 80% likely that the change would have happened anyway, even without the programme.	It's 50% likely that the change would have happened anyway, even without the programme.	It's 30% likely that the change would have happened anyway, even without the programme.	The change would not have happened if the programme didn't exist.
I feel more positive about working at OVO.					
I feel inspired to volunteer again.					
I feel connected to my local community and/or the areas near my office.					
I feel contributing to improving OVO's relationship with the communities.					

11. In addition to the OVO Gives Back programme, who do you think have also contributed to the changes?

*Please write down other contributors, if any.*

Statement	Other people that contribute to the change
I feel more positive about working at OVO.	

I feel inspired to volunteer again.	
I feel connected to my local community and/or the areas near my office.	
I feel contributing to improving OVO's relationship with the communities.	

12. Can you rate how important these changes are for you?

*Please put X on the options you choose.*

Statement	not important	less important	so-so	quite important	very important
I feel more positive about working at OVO.					
I feel inspired to volunteer again.					
I feel connected to my local community and/or the areas near my office.					
I feel contributing to improving OVO's relationship with the communities.					

13. How long did the change last for (or do you think the change will last)?

*Please put X on the options you choose.*

Statement	3 months	6 months	1 year	2 years	over 2 years
I feel more positive about working at OVO.					
I feel inspired to volunteer again.					
I feel connected to my local community and/or the areas near my office.					
I feel contributing to improving OVO's relationship with the communities.					

14. Did something good not happen because of the OVO Gives Back programme? Or something bad happened because of the OVO Gives Back programme?

15. Following Question 14, how much do you think the OVO Gives Back programme is responsible for it?

*Please provide a rough percentage, if possible.*

Thank you for your time to share your thoughts!

### **OVO Foundation SROI survey for OVO Gives Back – Charity partners**

Thank you for your time taking this survey. It aims to understand your experience with the OVO Gives Back programme. It will take you around 5-10 minutes to complete.

1. What is the name of your organisation?

2. Were there OVO volunteers participating in your organisation?

Yes/No.

3. How much time have you spent in applying for the OVO Gives Back grant? How does the time needed compare to other grant applications (to what extent is it more or less)?

4. How much time have you spent in meeting the requirement of OVO Gives Back, such as reporting? How does the time needed compare to the requirement by other funders (to what extent is it more or less)?

5. Apart from the above, what do you contribute to the OVO Gives Back programme in terms of resources, staff time, coordination and support? How much would you value it?

6. Since you participated in the OVO Gives Back programme, what do you feel about the following statement?

*Please put X on the options you choose.*

Statement	Much more	A little more	The same	A little less	Much less
We can better meet our anticipated outcomes through the support of volunteers.					

We can better meet our anticipated outcomes through the support of grant funding.					
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7. Following the options which you chose above in Question 6, how much do you think the OVO Gives Back programme contributed to this change?

*Please choose an option. For example, in Question 6, if you chose 'much more' for the statement 'We can better meet our anticipated outcomes through the support of volunteers.' How much do you think the OVO Gives Back programme contributed to this change?*

Statement	The programme is the only thing that caused the change.	The programme contributed to the change a lot.	Half of the change is due to the programme.	The programme contributed to the change a little.	The programme has nothing to do with the change.
We can better meet our anticipated outcomes through the support of volunteers.					
We can better meet our anticipated outcomes through the support of grant funding.					

8. Following the options which you chose above in Question 6, how much do you think the change would have happened anyway? In other words, how much do you think the change will happen, no matter if you joined the OVO Gives Back programme or not?

*Please choose a percentage.*

Statement	100%	80%	50%	30%	0%
	This change would have happened anyway. The programme didn't contribute to the change.	It's 80% likely that the change would have happened anyway, even without the programme.	It's 50% likely that the change would have happened anyway, even without the programme.	It's 30% likely that the change would have happened anyway, even without the programme.	The change would not have happened if the programme didn't exist.
We can better meet our anticipated outcomes through the support of volunteers.					
We can better meet our anticipated outcomes through the support of grant funding.					

9. In addition to the OVO Gives Back programme, who do you think have also contributed to the changes?

*Please write down other contributors, if any.*

Statement	Other people that contribute to the change
-----------	--

We can better meet our anticipated outcomes through the support of volunteers.	
We can better meet our anticipated outcomes through the support of grant funding.	

10. Can you rate how important these changes are for you?

*Please put X on the options you choose.*

Statement	not important	less important	so-so	quite important	very important
We can better meet our anticipated outcomes through the support of volunteers.					
We can better meet our anticipated outcomes through the support of grant funding.					

11. How long did the change last for (or do you think the change will last)?

*Please put X on the options you choose.*

Statement	3 months	6 months	1 year	2 years	over 2 years
We can better meet our anticipated outcomes through the support of volunteers.					
We can better meet our anticipated outcomes through the support of grant funding.					

12. Did something good not happen because of the OVO Gives Back programme? Or something bad happened because of the OVO Gives Back programme?

13. Following Question 14, how much do you think the OVO Gives Back programme is responsible for it?

*Please provide a rough percentage, if possible.*

Thank you for your time to share your thoughts!

# Impact map

## Project Jua

The Outcomes (what changes)									deadweight %	displacement %	attribution %	drop off %	Impact
Description	Indicator	Source	Quantity	Duration	Outcomes start	Financial Proxy	Value in currency	Source	What would have happened without the activity?	What activity did you displace?	Who else contributed to the change?	Does the outcome drop off in future years?	Quantity times financial proxy, less deadweight, displacement and attribution
How would the stakeholder describe the changes?	How would you measure it?	Where did you get the information from?	How much change was there?	How long does it last after end of activity?	Does it start in period of activity (1) or in period after (2)	What proxy would you use to value the change?	What is the value of the change?	Where did you get the information from?					
Improved accessibility to education in rural sites	Saved costs of paying unreliable grid energy by schools	Project Jua needs assessment	73%	1.86	2	US\$95,940 – annual costs of current energy sources at schools	95,940.00	Project Jua needs assessment	0%	2%	6%	27%	64,406.47
	Hours saved commuting between schools and electrified sites	Project Jua needs assessment; desk-based research	87600	1.86	2	US\$1.5 – teachers' hourly rate	1.5	Pay scale	0%	2%	6%	27%	120,837.65
Students have better learning experience.	Free-up time of family members to pursue other activities (in hours)	Workshop	8469309	1.86	2	USD 18.88 – the willingness-to-accept value of leisure time	0.35	Time Is Money: Investigating the Value of Leisure Time and Unpaid Work	2%	2%	35%	27%	1,868,600.80
Students perform better.	Investment in electrifying the classrooms in primary schools (USD) – boys	Energy4Impact. Implementation Phase Report-PROJECT JUA: May 2019 - December 2020	19846.65	1.82	2	17.1% return from investment in primary education in middle-income countries	1.17	Returns to Investment in Education: A Decennial Review of the Global Literature	0%	2%	35%	23%	14,867.68
	Investment in electrifying the classrooms in primary schools (USD) – girls	Energy4Impact. Implementation Phase Report-PROJECT JUA: May 2019 - December 2020	18469.12	1.82	2	19.1% return from investment in primary education in middle-income countries for girls	1.19	Returns to Investment in Education: A Decennial Review of the Global Literature	0%	2%	35%	23%	14,072.04

	Investment in electrifying the classrooms in secondary schools (USD) – boys	Energy4Impact. Implementation Phase Report-PROJECT JUA: May 2019 - December 2020.	19846.65	1.82	2	12.8% return from investment in secondary education in middle-income countries	1.13	Returns to Investment in Education: A Decennial Review of the Global Literature	0%	2%	35%	23%	14,321.73
	Investment in electrifying the classrooms in primary schools (USD) – girls	Energy4Impact. Implementation Phase Report-PROJECT JUA: May 2019 - December 2020.	18469.12	1.82	2	14.8% return from investment in secondary education in middle-income countries for girls	1.15	Returns to Investment in Education: A Decennial Review of the Global Literature	0%	2%	35%	23%	13,563.98
Improved accessibility to health in rural sites.	Saved costs of paying unreliable grid energy by clinics	Project Jua needs assessment	71%	2.38	2	USD 7,992 – annual costs of current energy sources at schools	7992	Project Jua needs assessment	0%	17%	8%	8%	4,334.55
	Hours saved commuting between clinics and electrified sites	Project Jua needs assessment; desk-based research	2400	2.38	2	USD 1.94 – nurses' hourly rate on average	1.94	MyJobMag	0%	17%	8%	8%	3,556.67
Patients feel supported to access health services.	Increased number of patients served	Project Jua needs assessment; assumption	17453	2.38	2	USD 78.6 – annual total government health expenditure per capita in Kenya	10.93	International Journal for Equity in Health	0%	17%	8%	8%	145,743.96
More lives saved due to increased access to healthcare services.	Children saved	Project Jua needs assessment; assumption	41	2.35	2	USD 153 – the cost per year of healthy life saved	153	London School of Hygiene & Tropical Medicine	8%	17%	8%	8%	4,373.70
Tonnes of carbon emissions saved.	Tons of carbon emissions saved in schools	Energy4Impact. Implementation Phase Report-PROJECT JUA: May 2019 - December 2020.	631635.44	1.81	2	Global average carbon price of USD 22 per ton of carbon emission	22.8	International Monetary Fund; Ecosystem Marketplace	2%	0%	8%	17%	12,955,760.97
Tonnes of carbon emissions saved.	Tons of carbon emissions saved in clinics	Project Jua needs assessment; assumption	197,326.66	2.38	2	Global average carbon price of USD 22 per ton of carbon emission	22.8	International Monetary Fund; Ecosystem Marketplace	0%	0%	17%	8%	3,749,206.63

## Future Builders

The Outcomes (what changes)									deadweight %	displacement %	attribution %	drop off %	Impact
Description	Indicator	Source	Quantity	Duration	Outcomes start	Financial Proxy	Value in currency	Source	What would have happened without the activity?	What activity did you displace?	Who else contributed to the change?	Does the outcome drop off in future years?	Quantity times financial proxy, less deadweight, displacement and attribution
How would the stakeholder describe the changes?	How would you measure it?	Where did you get the information from?	How much change was there?	How long does it last after end of activity?	Does it start in period of activity (1) or in period after (2)	What proxy would you use to value the change?	What is the value of the change?	Where did you get the information from?					
Young people can save money while maintaining tenancy.	Number of young people saving money and living in Future Builders homes in Bristol	Future Builders programme reporting	32	1.86	1	Rent saved per year per person	1,929.20	GOV.UK	17%	6%	0%	33%	48,615.84
	Number of young people saving money and living in Future Builders homes in Sheffield	Future Builders programme reporting	13	1.86	1	Rent saved per year per person	1,850.68	GOV.UK	17%	6%	0%	33%	18,946.34
	Number of young people saving money and living in Future Builders homes in Norfolk	Future Builders programme reporting	6	1.86	1	Rent saved per year per person	1,289.08	GOV.UK	17%	6%	0%	33%	6,090.90
	Number of young people saving money and living in Future Builders homes in Perth	Future Builders programme reporting	3	1.86	1	Rent saved per year per person	529.88	GOV.SCOT	17%	6%	0%	33%	1,251.84
Young people feel supported living in affordable housing	Number of people housed in the properties refurbished in 2019-2020 in Bristol	Future Builders reporting	5	1.24	1	Rent generated per year	585.84	Future Builders reporting	0%	6%	0%	47%	2,768.09
	Number of people housed in the properties refurbished in 2019-2020 in Sheffield	Future Builders reporting	9	1.24	1	Rent generated per year	360.00	Future Builders reporting	0%	6%	0%	47%	3,061.80
	Number of people housed in the properties refurbished in 2019-2020 in Norfolk	Future Builders reporting	6	1.24	1	Rent generated per year	600.00	Future Builders reporting	0%	6%	0%	47%	3,402.00

	Number of people housed in the properties refurbished in 2019-2020 in Perth	Future Builders reporting	3	1.24	1	Rent generated per year	570.00	Future Builders reporting	0%	6%	0%	47%	1,615.95
	Number of people housed in a Future Builders property	Future Builders programme reporting	54	1.79	1	Cost of NEET (not in education, employment or training) homeless young person aged 18-24 per year	19,400.00	CentrePoint	0%	6%	0%	47%	989,982.00
Young people move on to positive accommodation pathway	Number of people moving on to positive accommodation pathway	Future Builders programme reporting	13	1.68	2	The value of being able to pay for housing	7,347.00	HACT	17%	6%	32%	35%	51,146.14
Young people sustain employment	Number of people sustaining employment	Future Builders programme reporting	10	1.69	2	Minimum wage per year in the UK for aged 21 to 22	14,650.06	GOV.UK; ONS	22%	0%	32%	44%	77,482.56
Young people grow and sustain their wellbeing	Number of people that grow and sustain their wellbeing	Future Builders programme reporting; survey	78	1.82	2	The value of feeling in control of life (per person per year)	12,470.00	HACT	11%	11%	32%	39%	522,594.61
Young people live independently	Number of young people moving on from the Future Builders homes	Future Builders programme reporting; survey	17	1.00	2	The lifetime public costs saving for a NEET young homeless person	182,966.63	The Centre for Community Research; University of York; CentrePoint	17%	11%	32%	28%	1,566,736.46

## OVO Gives Back

The Outcomes (what changes)									deadweight %	displacement %	Attribution %	drop off %	Impact
Description	Indicator	Source	Quantity	Duration	Outcomes start	Financial Proxy	Value in currency	Source	What would have happened without the activity?	What activity did you displace?	Who else contributed to the change?	Does the outcome drop off in future years?	Quantity times financial proxy, less deadweight, displacement and attribution
How would the stakeholder describe the changes?	How would you measure it?	Where did you get the information from?	How much change was there?	How long does it last after end of activity?	Does it start in period of activity (1) or in period after (2)	What proxy would you use to value the change?	What is the value of the change?	Where did you get the information from?					
Staff feel more positive about working at OVO	Number of people feeling more positive	OVO volunteer records	70	1.45	1	Cost of three team building events per person	234.00	White Rhino (a team building event organiser)	9%	14%	9%	55%	11,691.21
Staff feel inspired to volunteer again	Extra hours staff spent in volunteering	SROI staff survey	168	1.80	1	The value of volunteering per hour	14.43	Office for National Statistics	0%	14%	9%	36%	1,903.33
	Extra donation made by staff after volunteering	SROI staff survey	14	1.80	1	GBP 50 – Extra donation made by staff after volunteering	50.00	Staff survey	0%	14%	9%	36%	549.59
	Extra donation made by staff after volunteering	SROI staff survey	7	1.80	1	GBP 100 – Extra donation made by staff after volunteering	100.00	Staff survey	0%	14%	9%	36%	549.59
Staff feel connected to their local community and/or areas near the office	Number of people who feel connected to their local community and/or areas near the office	SROI staff survey	70	1.14	1	The value of feeling belonging to neighbourhood	3,753.00	HACT	9%	14%	9%	73%	187,509.02
Staff feel contributing to improving OVO's relationship with the communities.	Hours spent by OVO staff volunteering in the communities	SROI staff survey	1988	1.32	1	The value of volunteering per hour	14.43	Office for National Statistics	9%	14%	9%	55%	20,475.21

Charities meet their anticipated outcomes because of the help of OVO volunteers.	Volunteering hours that could help charities meet anticipate outcomes	SROI staff and charity survey	1420.00	0.79	1	Average hourly rate of an employee in the charity sector	13.00	The Guardian	29%	0%	38%	86%	8,241.07
Charities meet their anticipated outcomes because of OVO's grant funding	Hours saved to apply for OVO grants rather than others	Estimated hours through the consultation with charities; Telegraph	800	2.05	1	Average hourly rate of an employee in the charity sector	13.00	The Guardian	0%	0%	38%	27%	6,500.00

## Endorsement Letter from Social Value UK

Date: 01.03.2022

To Whom It May Concern,

**Re: Endorsement Letter for OVO Foundation A Forecast Social Return on Investment Analysis on the Impact of OVO Foundation programmes**

Social Value UK were engaged by The Social Investment Consultancy to review and assure the social value and SROI practice undertaken for the OVO Foundation. This has consisted of:

- Pre Report Assurance Outcomes Check for the initial draft of the report 'A Forecast Social Return on Investment Analysis on the Impact of OVO Foundation programmes'
- Report Assurance for 'A Social Return on Investment Analysis on the Impact of Project Jua at OVO Foundation'
- Report Review and Endorsement Statement for final report 'A Forecast Social Return on Investment Analysis on the Impact of OVO Foundation programmes'

The ultimate aim of the assurance engagements was to provide an endorsement statement for the full composite report covering the 3 OVO Foundation projects, Project Jua, Future Builders and OVO Gives Back. The Report Assurance process also aimed to provide full report assurance for the report 'A Social Return on Investment Analysis on the Impact of Project Jua at OVO Foundation' which was awarded in November 2021.

We write today with final letter including endorsement statement for the report 'A Forecast Social Return on Investment Analysis on the Impact of OVO Foundation programmes'. This letter includes overview feedback outlining alignment of the report with the Social Value Principles<sup>98</sup>.

The Report Review included review of the following documents:

- OVO Foundation - A Forecast Social Return on Investment Analysis on the Impact of OVO Foundation programmes
- OVO Future Builder – SVUK IMPACT MAP – Final
- OVO Gives Back – SVUK IMPACT MAP – Final
- OVO Project Jua – SVUK IMPACT MAP – Final

**Points to note about the Social Value Principles:**

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<sup>98</sup> <https://socialvalueuk.org/what-is-social-value/the-principles-of-social-value/>

The assurance services run by SVUK, and co-developed with Social Value International, are testing application of the Social Value Principles in practice, checking for alignment to and application of the Principles throughout the process undertaken to develop the social value data, and subsequent reports, and decisions taken based on the data.

The Social Value International (SVI) approach to accounting for value is based on application of the Social Value Principles. The Principles are guiding practice that is anthropocentric focusing on value to people as informed by people. Where possible the effects of environmental changes should be articulated in the value this creates for people, and this should be informed through stakeholder involvement.

The approach can recognize and allow for the accounting for environmental impacts if they lead to changes to people that cannot be consulted with i.e. future generations and the global population.

The approach also allows for different types of value to be captured such as those incorporated in economic value.

## **SVUK Endorsement Statement for the OVO Foundation Report 'A Forecast Social Return on Investment Analysis on the Impact of OVO Foundation programmes':**

Social Value UK endorse the practice undertaken to develop the OVO Foundation Report 'A Forecast Social Return on Investment Analysis on the Impact of OVO Foundation programmes'. The process undertaken reviewing the report has shown good alignment throughout with all of the Social Value Principles. This endorsement does not provide assurance of the report in alignment to the Social Value Principles tested against the SVI Report Assurance Standard. It endorses the reports alignment with the Social Value Principles only and does not include verification of stakeholder engagement, report data and calculations.

## **Feedback on the OVO Foundation report on alignment to the Social Value Principles of case reports:**

The report is a forecast SROI of 3 programmes run by the OVO Foundation: Project Jua, Future Builders and OVO Gives Back. The report builds on an assured SROI report of the Project Jua project, which has been assured by SVUK on behalf of Social Value International. The report is a composite report aggregating the value of the 3 projects into one report. Because of level of detail needed to achieve report assurance, it is difficult for a composite report to achieve full report assurance in its entirety. However, this report shows good alignment to the Social Value Principles throughout the report. An overview of the key points in relation to each principle, including areas of improvement, are outlined below.

### **Overall:**

- The purpose of the study is stated as to support OVO Foundation's internal management, hoping that the SROI analysis can help understand the values created thus far and areas of improvement, by taking into account the feedback of charity partners, beneficiaries and stakeholders.

- The report outlines the SROI methodology undertaken, and the Social Value Principles. The Social Value Principles have recently been updated with an eighth principle 'Be Responsive' which has also been included in the report.
- The report includes a detailed section on limitations of the study which is really useful to see, and gives a good idea of areas of limitation to consider when analysing and using the findings of the report to inform decision making.

## **Principle 1: Involve Stakeholders**

- In applying Principle 1 Involve Stakeholders, the report has included stakeholders for all 3 projects that are reported on.
- There is recognition in the report that there are limitations in the stakeholder engagement in some areas, and suggestions for how this can be improved in the future, This is particularly necessary for areas of the reporting where primary stakeholders and beneficiary groups are being reported on, but are not able to input into defining outcomes fully.
- Involving Stakeholders is the 'red thread' principle running through the rest of the practice, and is particularly important for understanding change as outlined below. Limitations in this area are outlined in the report and noted as areas for improvement in future practice.

## **Principle 2: Understand What Changes**

- In applying Principle 2 Understand Change, the analysis has engaged with stakeholders through surveys testing the outcomes that have been defined. There is opportunity for stakeholders to input onto the wording of the outcomes, and inform if anything is missing.
- There is recognition that more direct interview practice with stakeholders including qualitative open questions to hear the experience of the stakeholders in their own words would be good to undertake in the future. This was particularly challenging because of the covid constraints during the study, as well as language and geographical barriers, and time / resource constraints for some of the stakeholder groups. The recognition of these limitations, and recommendations for future practice are good to see.
- There are Theories of Change presented for each programme and evidence that Theories of Change have been refined and changed based on engagement with stakeholders. There are also chains of change developed for each broad stakeholders group.
- In the future better analysing differences within groups will be useful for impact management. This is also recognised as a potential practice improvement area for future social value management practice.

## **Principle 3: Value What Matters**

- In applying Principle 3 Value What Matters, the analysis includes financial proxies for all of the included outcomes.

- The process of deciding on these financial proxies is clearly outlined with description of the method chosen. In some cases multiple indicators are used to help with reducing bias for proxy.
- There is recognition that more stakeholder engagement could better inform the choice of financial proxy, which could be an improvement to practice in the future. There is recognition in the limitation section that some of the financial proxies could have some issues in terms of applicability based on context. There is reasonable and transparent description of these limitations allowing the reader to acknowledge these when interpreting the results.

#### **Principle 4: Only Include What is Material**

- In applying Principle 4, Only Include What is Material, the report references materiality, in numerous places. There is reference to reviewing materiality of outcomes for inclusion in the analysis in sections covering material outcomes for schools, for clinics, for the environment, for young people, for staff volunteers, and for charities. The different outcomes for different stakeholders are discussed in relation to their respective programme.
- There is an interesting discussion on the inclusion of the environment as a stakeholder and the professional judgements undertaken to do this.
- The materiality assessments assess relevance through engagement with stakeholders, and significance through amounts of change experienced by stakeholders. This is incorporated into an overall 'relevance' assessment in the report, which could be slightly clearer as to the application of the double materiality assessment that has been undertaken.

#### **Principle 5: Do Not Overclaim**

- In applying Principle 5, Do not overclaim the report includes extensive data on causality factors attribution, displacement, deadweight and duration and drop off. All factors have been informed by data gathered by stakeholders.
- There is recognition that some assumptions and estimations are made in the application of these factors, and the discounts applied. This is recognised as a potential area for improvement in the conclusions and recommendations section of the report.
- There is also the possibility of including data from secondary sources which may change the assumptions on the different discount factors depending on the programme and context. This is recognised as a potential area for improvement in the conclusions and recommendations section of the report.
- Overall there is clear, consistent and well described practice on the application of Principle 5: Do Not Overclaim.

#### **Principle 6: Be Transparent**

- In applying Principle 6, Be Transparent, the report has transparent description of the process that has been undertaken to engage stakeholders, define the outcomes, assess for materiality, value the outcomes, and ascertain the causality factors.
- There could be more inclusion of third party research, which is noted in the recommendations and conclusions section of the report.

- The report includes the impact maps for full disclosure for readers who want to analyse the information in more detail.
- The SROI is presented as an average single number based on the SROI values of the 3 projects. The report also includes the SROI ranges for all 3 projects as well as the overall value, which helps to show the distribution of the value between the projects, and mitigate for the issue of aggregated figures if the distribution of value is not also reported on.
- Overall the report presents a good application of Principle 6: Be Transparent.

### **Principle 7: Verify the Results**

- In applying Principle 7, Verify the Results, the report states that the results were checked with different stakeholder groups for all 3 programmes. This has included some representation from the primary stakeholder groups in all 3 programmes, as well as with other stakeholder groups.
- There are some points from this verification that have influenced the data in the report, and that bring greater confidence to the results. This is good practice to see. The Social Value Principles are first and foremost an accountability framework and checking with the stakeholders that are included and assessed in the analysis is a core part of the process.

### **Principle 8: Be Responsive**

- There has been the launch of Principle 8: Be Responsive as a part of the Social Value Principles during 2021. The report references this new principle.
- The report includes recommendations for both improvement to the social value practice, and recommendations for improvements to each of the projects based on the data, analysis of the data and overall results. This is good practice in terms of moving towards being responsive to the information gathered through the SROI process.

Please do not hesitate to reach out if you have any questions, comments or concerns

With Kindest Regards

Catherine Manning

Operations Director

Level 1 Associate Practitioner



Social Value UK