The Value of Business Involvement in Youth Development

An SROI Analysis of Merchants' CSR investment in Columba Leadership academy in partnership with Centurion College

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

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Executive Summary

This report is an Evaluative Social Return on Investment Analysis (SROI) commissioned by Merchants. Merchants is a business process outsourcing (BPO) solutions provider with more than 30 years' experience in contact centre creation and management.

The Corporate Social Responsibility (CSR) activities of Merchants focus on the development of leadership of youth and youth employment. The business has sponsored and attended five Columba Leadership Academies, three of which is with the Centurion College, which is the focus of this study. Columba Leadership is a social enterprise dedicated to developing young people from disadvantaged communities to improve their own lives and play a part in bringing about change to their schools and communities. Key questions that the Merchants executive team sought to answer were:

What is the value of the impact arising from the investment in the Columba Leadership academy to the various stakeholder groups and Merchants as a whole? What is our baseline from which we can measure future investment and return?

Merchants commissioned IAOS Consulting to assess their programme using SROI methodology.

Social Return on Investment (SROI)

The SROI methodology was originally developed by the Roberts Enterprise Development Fund in the USA, and was further enhanced in the UK, most recently through the Cabinet Office. Although SROI is a relatively new discipline in South Africa, it has been extensively used across the UK, United States, Europe and Australia for over a decade. It is a framework for understanding, measuring and accounting for the broad concept of value which incorporates social, environmental and economic benefits.

The context of this study was, thus, to assess the return on social value of the Merchants CSR engagement with the Columba Leadership academy focusing on the activities pertaining to Centurion College. Merchants commissioned a team to conduct an Evaluative Social Return on Investment Analysis on the three academies assessing the investment period from the last quarter of 2011 to the end of 2012.

The major stakeholders are first determined and the theory of change is investigated for each stakeholder group. Outcomes per stakeholder group are described based on evidence from direct stakeholder engagement and interaction. Indicators are identified for each outcome. A financial proxy is then assigned to each of the outcomes of value and a sensitivity analysis is conducted; thereby a return on investment is quantified. Filters are applied to account for those external factors which may have an effect on the overall impact created. All of the above takes place with a strong project management mind-set, where a strong sponsorship and a multi-disciplinary steering committee are key imperatives.

The major stakeholder groups were identified as:
1. Centurion College
2. Learners of the Centurion College who attended the residential academy
3. Merchants: the company
4. Employees of Merchants

Outcome Assessment Areas

The outcomes for the various stakeholder groups focus on the following value-generating areas:

- Centurion College
    - Increased networking with local businesses
    - Improved accountability of educators
    - Improved relationship between principal, educators, learners and parents
- Learners of the Centurion College who attended the residential academy
    - Improved access to workplace opportunities
    - Understanding of requirements for employment in formal sector
    - Improved leadership abilities
- Merchants
    - Increased direct recruitment of new employees who already showed values like integrity
    - Increased awareness of CSR outcomes by clients and industry
    - Increased attraction of new clients as a result of the initiative
- Employees of Merchants
    - Increased growth opportunities for employees who participated in the Future Leaders programme
    - Increased awareness of disadvantaged persons and own social responsibility
    - Increased attraction and retention of staff

Findings

The SROI analysis indicated that the programme delivers a SROI of 0.83:1 at least, i.e. for every R1 invested approximately R0.83 of social value is created.

During the stakeholder engagement process, some outcomes were identified which may take place in the future if certain actions are taken. We have thus tested these outcomes as part of the sensitivity analysis to show the potential future outcomes creation. If future outcomes that have not yet occurred were included in the analysis, a SROI of 4.72:1 was calculated, i.e. for every R1 invested today approximately R4.72 of additional social value will be created based on certain actions being undertaken.

It should be noted that a conservative approach to monetizing outcomes was adopted, while an attempt has been made to retain the different types of outcomes that occur at the different levels. Certain outcomes could not be included as a result of lack of evidence to allow monetising the outcomes. A sensitivity analysis was included to allow predictions of values for future outcomes and to test some of the assumptions made during this analysis.

The continued relationship between a corporate sponsor and school not only contributes to social value creation for the learners and school, but also for the employees and the business. More specifically, the influence of the programme on the school can contribute to the standing of the school and employability of the learners, while the long-term influence on the business lies in the enhancement of the corporate culture (and, ultimately, client engagement), thus becoming a significant company differentiator.

Social Value Add:

The SROI analysis clearly demonstrates that value is created for individuals, the school and the sponsor, Merchants.

Value for Merchants:
Merchants was able to use the programme as a tool to train current employees and to recruit new interns with whom a relationship was already established. The corporate was able to save costs and time on recruitment and training processes.

The activities transform aspects of the business through individual changes in employees who attend and become involved in the academies, which serves as a company differentiator and an agent of transformation towards an integrated South Africa. This intention enhances the profile to Merchants to investors and clients.

Value for the school:
Learners initiated two new projects as a direct result of the programme: A new library and a garden project. Although these are only in the initial phases of development it is anticipated that the long-term impact will be significant for the school and its learners.

The reputation of the school is enhanced in its partnership with Merchants and Columba. It is perceived as a school with the ability to assist learners to achieve their future tertiary and employment goals.

Value for the learners:
There are greater prospects of employability for learners - some learners who were subsequently employed by Merchants after completing matric. Learners also developed a more sophisticated understanding of the requirements of the workplace.

Learners were more likely to pursue tertiary education opportunities – the programme had equipped the learners with the self-belief and tenacity necessary to achieve their life goals.

Key Comments and Recommendations
The recommendations in this report aim to improve CSR activities and to monitor the achievement of long-term outcomes.
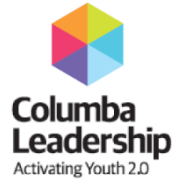
Recommendations for Merchants
 i. The results of this study can be used in conversations with different stakeholders, investors, existing clients, potential clients, potential partners, etc. The analysis could attract new business opportunities to Merchants.
 ii. The results of this study should be incorporated into the formal Merchants monitoring systems. Progress on these outcomes can direct future activities and strengthen the existing system.
 iii. The specific indicators that should be monitored include:
   - Changes in staff retention rates: Positive improvements indicate social value added
   - Changes in the company CSR Strategy (similar to those that happened in the BBBEE strategy)
   - Growth and diversification in the client portfolio: Increased attraction of off-shore and domestic clients through Merchants' CSR activities being regarded as a differentiating factor (demonstrating its socially responsible culture)
   - Positioning of Merchants as the leading CSR role in the Dimension Data Group
   - Increasing social responsibility at the individual level in current employees. The number of employees becoming aware of disadvantaged youth as an important part of the future workforce

- Development of employees' leadership abilities as a result of the programme
- Development of learners' leadership abilities as a result of the programme
- Initiatives the school undertakes as a result of the programme

iv. Employee Engagement
- Effective Communication: The results of this study can assist Merchants to improve engagement with employees. They provide insight into aspects that can be improved to enable optimal interaction.
- Mentorship: Investigating the possibility of individual mentorship between employees and learners on a continuous basis.
- Heightened Social Responsibility: The direct influence of attending the residential aspect of the academy has reached the concerned employees, but the influence has not yet permeated all levels or business units of Merchants. This is expected after continued involvement and when a critical mass is reached with more employees attending the academy.

v. Corporate Culture
- The relationship between Centurion College and Merchants provides an important insight into the effect that CSR activities can have on the beneficiary organisation as well as the business through organisational change. Changes are as far-reaching as aspects of employee culture to client engagement. Merchants made unique contributions through strong and passionate individual and company structures building long term relationships. A long-term relationship allows the time needed to develop leadership and mentoring skills. A short-term commitment would not yield a comparable outcome.
- The continued investment and engagement of Merchants with the school had significant effects on both parties. This effect will increase if the involvement continues and closer relationships are built between individuals of the two institutions.
  Due to the unique nature of these relationships, it cannot be expected that other businesses undertaking similar engagements would achieve the same SROI ratios. Each programme will have to be evaluated individually for its social value added.

Recommendations for Centurion College:
i. To continue networking and building new partnerships
ii. To use the Rotary structures and Interact Club to:
   a. Initiate other projects (e.g. roof-top markets)
   b. Engage and provide opportunities to link with other learners from (more privileged) schools for the benefit of the school; and to inspire and cascade the outreach projects to be included in those schools.
iii. Develop a monitoring system that can allow easy and close evaluation of indicators such as improvements in teachers' absenteeism, increase in grade marks for academy learners, etc.
iv. Encourage successful (e.g. employed) alumni to return to schools to motivate learners or become involved in continuous mentoring of learners.

Recommendations for Columba Leadership Academy:

i. Promote the outcomes that the Columba Academy had directly and indirectly on the funding partners.

ii. Investigate models of continued relationships between schools and business partners post-academy. Systems need to be established to ensure that there are clear responsibilities for each partner for future engagements.

iii. Investigate and promote repeat academies at schools. It seems that programme gains more momentum with each iteration. Also, repeating the programmes at the same school allows the programme to be refined and customised to its dynamic community.

iv. Developing mechanisms to allow "successful" learners to return to schools to motivate learners.

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Abbreviations

BBBEE	Broad-Based Black Economic Empowerment
BPO	Business Process Outsourcing
CSR	Corporate Social Responsibility
DD	Dimention Data Group
F2F	Face to Face
Focus Group	A group selected to discuss a specific issue
HR	Human Resources
IT	Information Technology
M&E	Monitoring and Evaluation
NTT	Nippon Telegraph and Telephone Corporation
OVC	Orphans and Vulnerable Children
SROI	Social Return on Investment Analysis
SVA	Social Value Add
ToC	Theory of Change

1. Introduction

This report is an Evaluative Social Return on Investment Analysis (SROI) of Merchants' Corporate Social Responsibility investment with Columba Leadership in Centurion College in Pretoria, South Africa.

Merchants is a business process outsourcing (BPO) solution provider. The company has more than 30 years' experience in creating and managing contact centre operations around the world. The Corporate Social Responsibility (CSR) activities of Merchants focus on the development of youth leadership and youth employment. One such initiative is the involvement with Columba Leadership where Merchants supported five academies, three of which were with Centurion College.

Columba Leadership is a social enterprise dedicated to realising the potential of young people from disadvantaged communities to improve their own lives and play a part in bringing about change to their schools and communities.

Merchants aims to utilise social return on investment (SROI) analysis to demonstrate that its CSR activities deliver measurable impacts to the beneficiaries and stakeholders. That its CSR initiatives offer a viable tool for social transformation that affects the workplace as much as the community. Merchants is primarily concerned with youth development and employment because the youth are the future of the economy.

2. Background

2.1 Merchants Overview

Merchants, is a leading BPO solution provider specialising in customer experience and customer interactions. Merchants focuses on people, process and technology to create exceptional customer experiences. The company is a pioneer in the contact centre industry with over 30 years' experience in creating and managing contact centre operations around the world. The services and solutions are built on models, systems, processes and leading technologies that are based on best practice standards enabling the company to deliver real business value.

The company is part of the Dimension Data Group (DD) - a prominent global specialist IT service and solution provider, and Nippon Telegraph and Telephone Corp (NTT). Dimension Data was founded in 1983 at the inception of networking communications and is a specialist IT services and solutions provider that helps clients plan, build, support and manage their IT infrastructures. Today they are positioned at the forefront of networking and communications in 49 countries on five continents around the world.

One of the key strengths of the company is its passion for people. What differentiates Merchants from its competitors is the ability to attract the best talent, coupled with a rich history of success and innovation across different industries around the world.

At Merchants they believe that exceptional business performance starts with the individual and they invest in their people by continuously offering development opportunities enabling them to achieve their goals and reach their true potential. Many of the contact centre agents progress to senior management positions as they develop their careers. This investment promotes long-term relationships with its employees and enhances staff retention.

2.1.1 CSR activities

At Merchants, Corporate Social Responsibility (CSR) is less about signing a cheque or ticking a box, and more about giving young men and women the courage to dream and providing the opportunities to achieve those dreams. The company has taken a strategic approach to Corporate Social Responsibility and firmly believes that the value of initiatives embarked on must deliver value not only to the beneficiaries but also be aligned to the strategic direction of the company. Integral to this is the opportunity for employee involvement in CSR activities.

The corporate CSR ethos is committed to youth employment and is about investing in the next generation. By giving young learners the tools and values they need to become the leaders of the future, Merchants can tap into a wealth of talent by showing them the bridge to a brighter future.

Merchants' partnership with the Columba youth leadership academy South Africa is one instance of this commitment. Through Columba's Leadership Academies and Merchants' Future Leaders programme, school-going youth are taught the values of responsible leadership and given the tools to become agents of positive social change. The HR Director, Ms Victoria Ward is passionate about Merchants CSR strategy and is a driver of the Columba Leadership partnership. The culture of the organisation encourages individuals from the business to actively participate in this programme, sharing their experiences as well as mentoring and coaching others.

2.2 Columba Leadership Overview

Inspired by the belief that Sir Norman Drummond, the founder of Columba, has in young people, and resonating to a similar purpose to give back after a successful corporate career, Rob Taylor established Columba Leadership (then called Columba 1400 SA) with youth practitioner and entrepreneur Buhle Dlamini in 2008. Prior even to the formal registration of the trust in 2010, the pair ensured that the faculty had been trained in Scotland. The programme was first adapted for South African conditions before a series of pilot academies were implemented.

The first three pilot academies in 2009 were followed by nine academies in 2010 and 18 in 2011. By December 2012, Columba had a total of 61 academies, reaching 645 learners, 36 principals and 166 educators. The philosophy behind the Columba programmes is simple: there is inner greatness within young people; all that is required, is to elicit this greatness. This can help young people bring powerful changes to not only their own lives but also to their schools and communities.

2.2.1 Columba Youth Leadership Programme

Columba Leadership supports a process of individual and institutional change in partnership with schools in disadvantaged areas. This change, be it individual or institutional, is one that happens from the inside-out when young people and significant adults in the school environment become aware of their own potential and work together to actualise this potential. Despite the numerous challenges faced by young people in disadvantaged communities in South Africa, exposure to the Columba Youth Leadership Academy ignites motivation and commitment to a process of bringing about personal and institutional change; establishing youth as leaders and role-models at the school and contributing to school

improvement and community development. The impetus for this change comes from recognition of personal value and the new-found sense of direction which comes from engaging with positive values.

A six day residential academy is at the core of the Youth Leadership Academy programme. Groups of 10-12 young people (selected on the basis of their commitment to improving their own lives and building a better society), two senior educators and the principal attend the residential academy. It is anticipated that these participants become the drivers of change in their local contexts. After the formal programme, they are encouraged to first lead the change required in their own lives, and then in the lives of others by being a positive influence and by mobilising others (i.e. through becoming values-driven role-models and leaders). Columban graduates continue to function as a group on their return from the residential academy. It is this group that metamorphoses into a functional and sustained values-driven youth engagement platform in the school.

The group is accommodated at a quality lodge in an attractive natural surroundings for the six day residential experience. Each day of the Academy focuses on one of the core values of the Colomban code of leadership.

2.2.2 Columba's Code of Leadership

Six values have held fast over time - in the words of those who have faced the challenge of leading communities of people. Regardless of sector, field or discipline, those that lead, know and understand the value of the six timeless themes that are intimately tied to creating community and moving that community more masterfully from intent to results.

AWARENESS

Knowing and understanding yourself, other people and your environment

FOCUS

Recognising and concentrating on critical and essential information

CREATIVITY

Seeing and implementing solutions, ideas and initiatives

INTEGRITY

Being reliable and trustworthy, remaining whole and true to your potential

PERSEVERANCE

Enduring and remaining strong when faced with complication, tragedy and resistance

SERVICE

Sharing resources selflessly and effectively, using your strengths and experience to take meaningful action and contribute to the greater good

All six principles are unattainable in an absolute sense. Rather, each requires a lifetime of refinement and enhancement. But all six principles are present in the actions and communications of those leaders who have served as responsible players in the unfolding human story.

In the programme, young people come to understand these values through an inward journey based on experiential learning which draws on lessons from nature, history, culture and the personal stories of people in the group. The residential academy highlights the greatness in every human being and shines the spotlight on the possibility of stepping into a role of leadership simply through leading change in one's own life, and consequently inspiring others to do the same rather than waiting for a formal leadership role to be bestowed upon one. The residential academy helps build the confidence of young people to contribute to positive change.

Columba uses a skilled team of facilitators to run the academies and to create the necessary conditions for change. Prior to graduating from the residential academy, participants are encouraged and challenged to take their values into the school and community context. The Columban Code challenges participants and facilitators alike to engage in challenging situations and adverse conditions that otherwise they may avoid. Through these challenges, academy participants gain new insight into themselves, others, into teamwork and leadership and life in general.

This new experience has the potential to achieve two broad outcomes: protective and promotional i.e. away from risky, deviant or non-productive pathways and towards pathways in which youth are able to become positive social contributors through transition into further education, training or employment and in their conduct as responsible citizens and servant leaders (SROI Baseline Analysis Report, 2009).

2.2.3 Columba Leadership Theory of Change

At the time of this study the exact intervention description and expected long term results were not clearly communicated by Columba Academy. However, it was only after the study that Columba worked on a more comprehensive Monitoring and Evaluation (M&E) system and then clarified and focussed their theory of change. The programme had to be adapted to the South African context and Columba itself developed significantly during the period when the SROI was conducted. It included an expansion in its staff compliment and dedicated departments.

One aspect that was not well developed and clear to all stakeholders during the intervention with Centurion College was the post-academy engagements between the school and Columba. The general feel from Merchants and the school was that any engagement between individuals from Merchants and the school was discouraged and even prohibited. It seemed that the only communication allowed was between the Merchants Human Resource Manager and the school principal. This has since the study been changed and a much clearer strategy now exist for post-academy contact and for the expected results chain.

The current programme strategy is attached as Appendix A. The SROI and other research and the appointment of an M&E officer contributed to this document. Columba Leadership represents their Theory of Change as follows (see Figure 1).
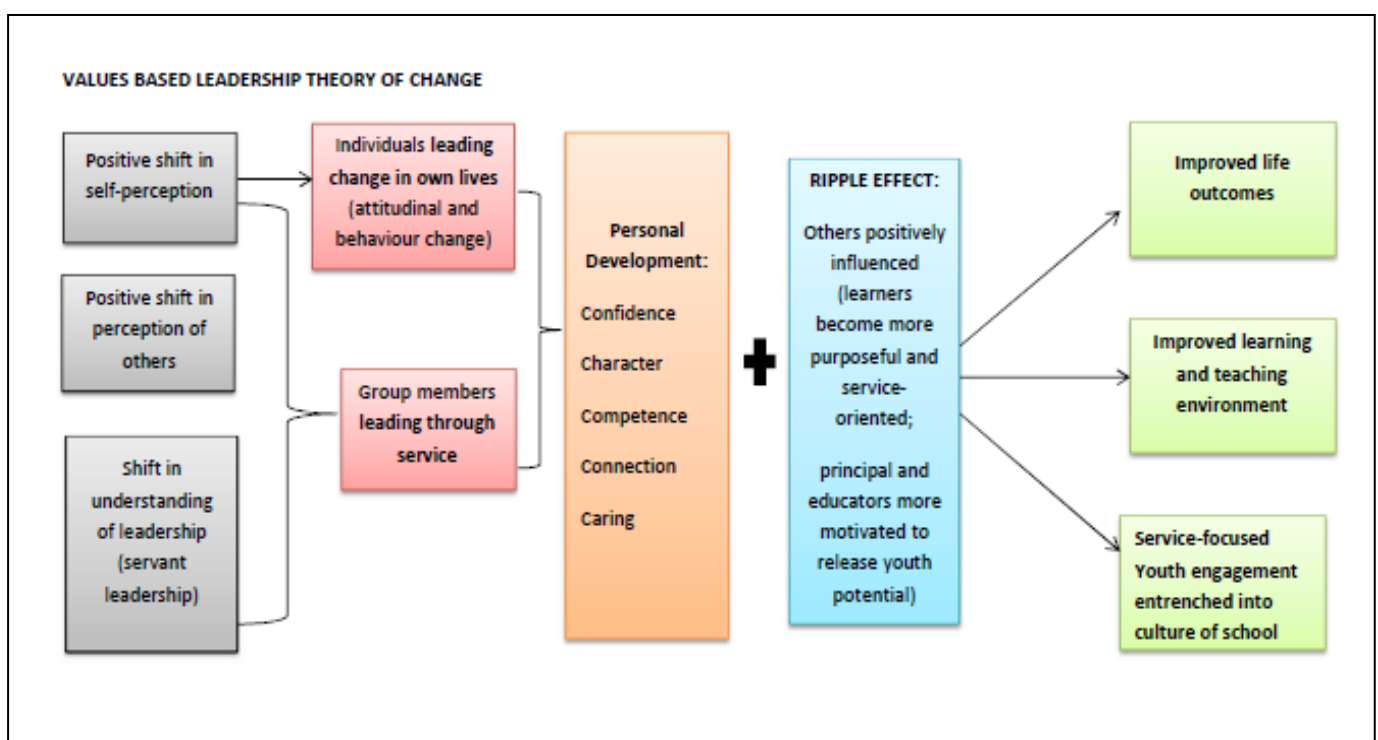
Figure 1 Columba Leadership Theory of Change

The consultant developed this theory further to gain an understanding of the expected changes and outcomes the academy can have on the lives of the learners and other stakeholders. This was done through continuous and extensive consultation with Columba Leadership during and after the study. See Figure 2.

In essence the Columba Leadership presents leadership academies (10 day interaction as described above) to pre-selected and prepared learners (after engagement with the school and parents). During the academy immediate individual shifts are produced to enhance the perception of self and others and understanding of leadership. In follow-up activities initiated by the learners such as project to improve the school or community the leadership skills are practiced and further developed. In the longer term the learners have an increased appreciation of the value of education and of their own potential. This should lead to increased school performance (grade marks and school leaving results). It should also lead to an increased feeling of belonging (first in themselves, then as a group in the school and

ultimately as part of the community). The ultimate long term impact of this should then be further education and employment.

For the stakeholders at the school the immediate change is an understanding of and relationship with the learners and improved accountability and responsibility. This enhances the engagement with learners and through long term projects enables the school to achieve a new and improved vision.

For the business involved in sponsorship, individual team members who participate in the academies are changed personally through being touched by the learners and their stories. They communicate better especially with other staff members and clients (including potential clients) which should in the long term positively influence the organisational culture. This leads to staff retention (due to staff feeling more positive about the organisation) and attraction of clients who perceive the organisation to be more socially responsible.

Other stakeholders might also change due to improved networking and through the projects started by the learners after the academy.
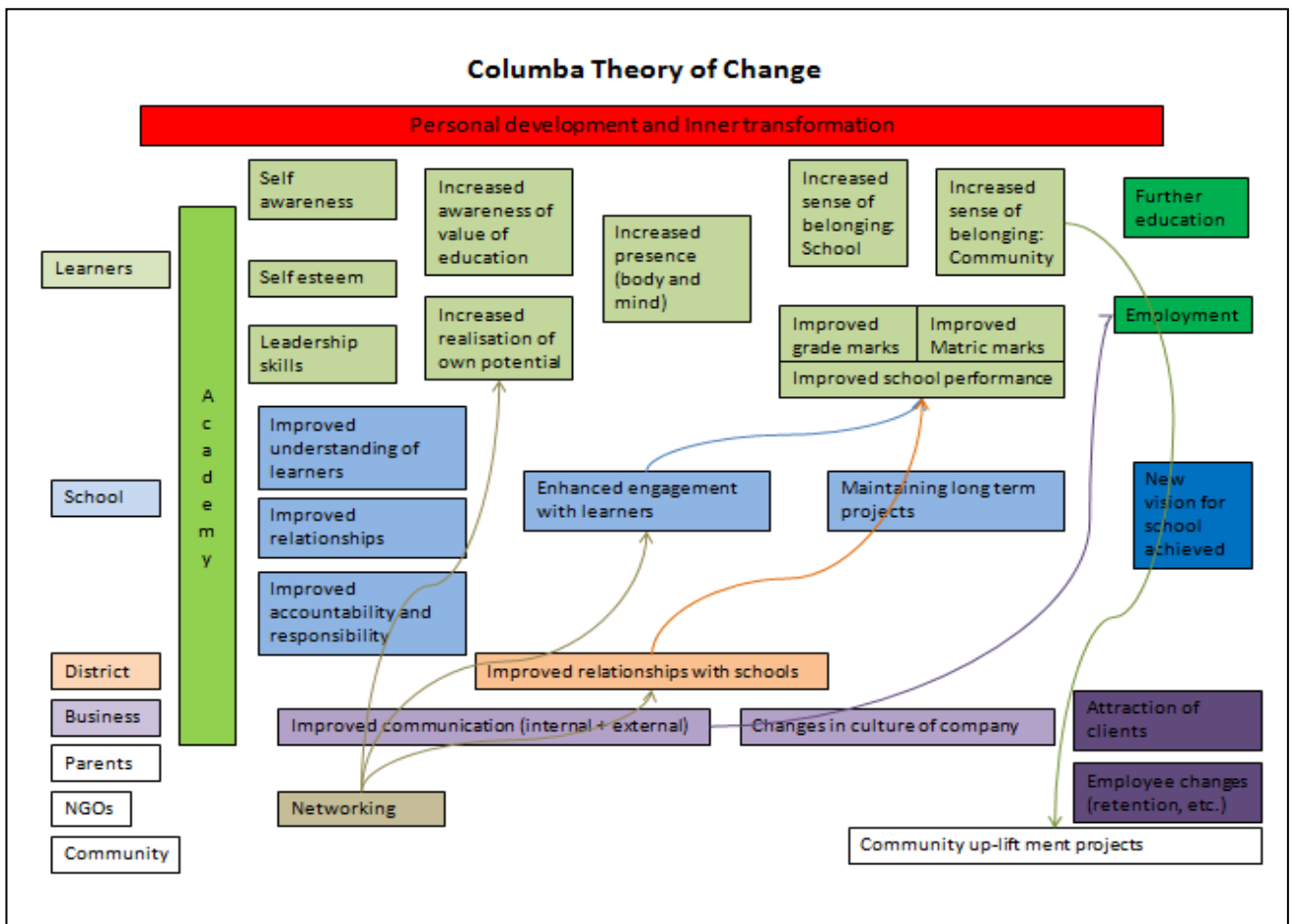
Figure 2 Columba Leadership Theory of Change (Consultant expanded version)

It is, however, important to note that this is the intended theory of change as articulated by Columba Leadership and interpreted and documented by the consultant. At the time of the SROI study the engagement with the Centurion College was in the early phases and the long term impact was not yet realised. Similarly there was a very strong expectation from the sponsoring organisation (Merchants) that anticipated long term results would be achieved. Although this might very possibly happen in the future, it was also not yet realised at the time of the study. Managing these expectations from Columba Academy and Merchants were challenging and is reflected in the iterative changes in the stakeholder groups and the expected and achieved (realised) outcomes.

2.3 Centurion College

Centurion College is an independent private school in Joubert Park, Johannesburg. The school is situated in the city centre and serves the inner city that is home to a large number of foreign nationals. The community can be considered disadvantaged and poor.

It is a combined school that offers education from Grade R to Grade 12. Although the school is a private school it is not used by more affluent families. The expectation of high quality education is exists at the school due to its private nature and not being part of the public school system. The physical location of the school in a highly dense population and the school building is in an area with limited open space and no grounds for recreation or sport activities exist. It is located in a high crime area.

Merchants' involvement with Centurion College was formalised in 2011 when it was identified as a partner for the Columba Leadership Academy. To date, Merchants has sponsored and contributed to five academies, three at Centurion College. Merchants has also maintained a strong relationship with the college since.
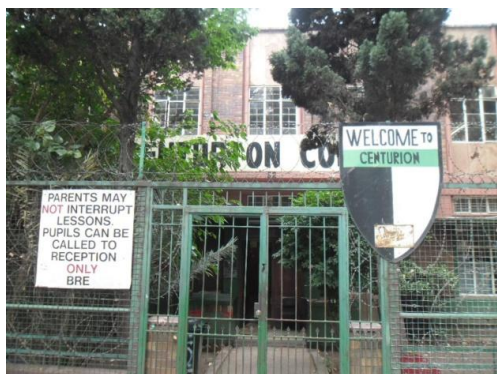
Figure 3 Entrance to Centurion College
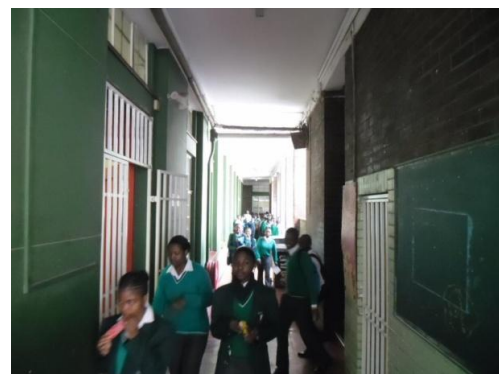
Figure 4 Learners of Centurion College

Figure 5 The outside of Centurion College

Figure 6 The school "grounds"

Figure 7 The direct neighbourhood of the school

Figure 8 Joubert Park and Hillbrow

3. The SROI Approach

3.1 Overview of the Approach

Social Return on Investment (SROI) is a measurement and accounting framework for the broad concept of value. SROI can be thought of as a broad approach to cost-benefit analysis which is primarily used in deciding whether or not the benefits resulting from an intervention justifies the costs. SROI has its roots in traditional return on investment analysis, but its definition of value includes the social, environmental and financial value created by an organisation.

SROI goes beyond the impact evaluation by identifying the extent of the resulting change from an intervention and also exploring the returns on the investment made to those who contribute to the change. The SROI ratio quantifies the financial value of the change compared to the investment value. The measurement, therefore, seeks to capture both the financial and social value of the change achieved through an intervention.

The approach and methodology applied, follows that laid out by the SROI Network. The guiding principles are listed in Appendix B. The steps involved are:
- define scope
- complete a stakeholder analysis
- develop an impact map
- identify appropriate indicators and financial proxies
- collect data on these indicators and financial proxies
- find appropriate comparison data
- collect data on expenditure or investment
- calculate the SROI
- do a sensitivity analysis, and
- produce a report

This project is supported by the SROI Network in the UK. The report also considers previous SROI analyses on two of the first three pilot academies of Columba Leadership which were conducted in South Africa in 2009. More information can be found at (http://www.thesroinetwork.org/).

The approach is depicted graphically below.
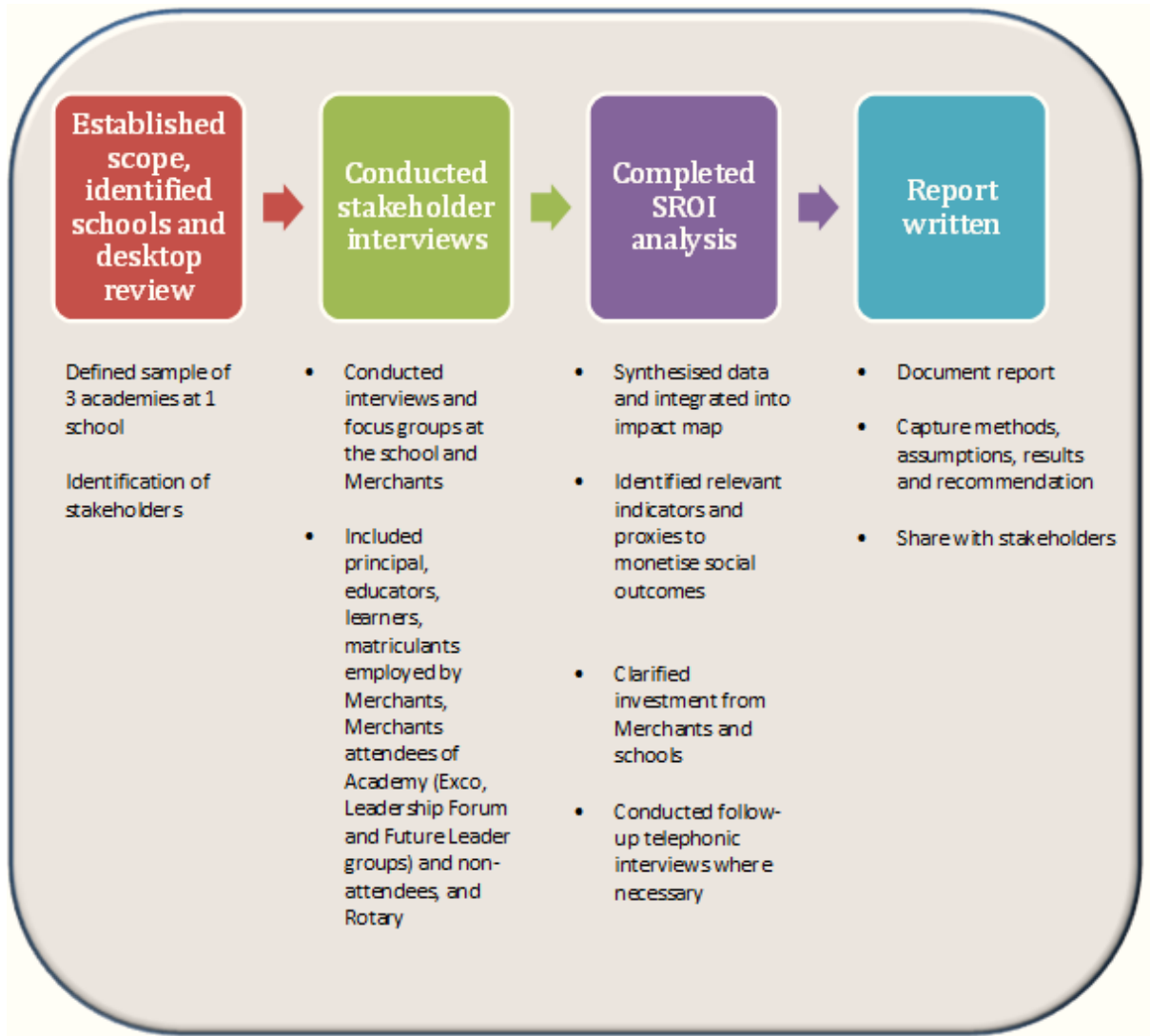
Figure 9 SROI Approach

3.2 Scope and Content

Merchants invested in various academies for schools both in Gauteng and Western Cape provinces. After discussions with Merchants it was decided to limit the current SROI to academies in Gauteng Province and subsequently to one school namely Centurion College.

Three academies were completed by learners from the Centurion College at the time of the study and a fourth academy with the same school was planned during the study. The third academy was completed just before the study commenced and much of the intervention that focussed on activities initiated after the academies was not yet implemented. This resulted in limited outcomes for this group. The steering committee and school decided to exclude the fourth academy from the SROI analysis as it was only in planning phase at the time. It is however, important to note that the academies have a cumulative effect and that although the tird academy did not seem to contribute to the outcomes for the learners who attended the 3rd academy, it will have an effect in the long term on building a critical mass that will move the

school and other learners (who did not attend any academy). At the time of this study it was not yet realised and is not included in this analysis.

This SROI analysis focuses on the investment of Merchants-Centurion College partnership with regard to the three Columba Leadership Academies which were conducted between the last quarter of 2011 and the end of 2012. The outcomes and impact of the third academy was less prominent, but it was included in the analysis. The first group of learners from Centurion College completed their final year of schooling at the end of 2012 and are currently in the process of confirming their plans for further education or employment. The second and third group of learners were in grade 11 and 12.

Data has been collected for the school and for Merchants for a one year period as the implementation of the intervention was after a year for the first academy. There were expectations from Columba Leadership (the implementing partner) and Merchants that the outcomes would be realised within a two year period. The SROI might seem to be premature as an evaluative analysis, but the timing is important. For Merchants the study is important at this stage to motivate for continued follow-up academies at the same school and to focus monitoring activities. For the school it was important to consider immediate and shorter term outcomes of the academy for learners in later grades (11 and 12) and for Columba Leadership it provided information on the critical point where the cumulative effect of subsequent academies start to create a larger impact. The expectation of certain elements of the impact to only occur in the future led to the inclusion of a sensitivity analysis that focussed on predicted outcomes. This was done to overcome the challenge of waiting for more significant outcomes to conduct an evaluative SROI or focussing solely on a predictive SROI. Some of the expected longer term impacts include: changes in the organisational culture at Merchants, influence on client attraction, and employability of matriculants of the school and access to further education.

3.3 Time frame

The time frame considered in this evaluation is from the end of 2011, when Centurion College, Merchants and Columba Academy first partnered; to the end of 2012. The SROI analysis was conducted in the first quarter of 2013. In 2013, the groups of learners who had participated in the programme were either in grade 11, grade 12; or they had graduated from school. The long term outcomes and impact on the learners were therefore not achieved yet.

The investment period for the direct interaction of the academy was 10 days each for two academies, but the continued activities of the groups continues for a year after the initial contact between the school and Columba Leadership. The investment for the first group was therefore longer than for the second group and third groups. However, since the academies have a cumulative effect **the investment period was regarded as one year.**

The period over which the outcomes are projected (duration) is different for the different stakeholders and are discussed further in Section 3.6.1.

3.4 The Stakeholders

Only stakeholders who contributed and/or benefit directly from the partnership between Merchants, Centurion College and Columba Leadership Academies were considered, as agreed by the Steering Committee at Merchants. The Steering Committee selected a limited number of stakeholders to interview and to participate in focus groups. Stakeholders who would be impacted only in the future were excluded from this analysis. In future analyses, it
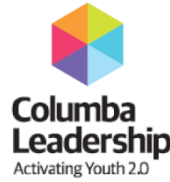
may be important to account for all stakeholders in the project.

Continued engagement with the School, Merchants and Columba provided opportunity to clarify information and to add additional context needed for the development and verification of outcomes, indicators and financial proxies. Values for the financial proxies were sourced from relevant service providers or existing indices.

Stakeholders were categorised as below:

- Category 1: Stakeholders from Centurion College
  - o Group 1: School
  - o Group 2: Learners
- Category 2: Stakeholders from Merchants
  - o Group 3: Merchants (the company)
  - o Group 4: Employees

Appendix C provides a description of the extended list of all stakeholders who were regarded as possible contributors or beneficiaries of the programme. It provides information on the decisions made to include or exclude specific groups and the motivation and decision makers. The major stakeholder groups are summarised in the following table:

Table 1 Stakeholders and the decision as to their inclusion in the analysis

	Stakeholder Group	Interviewed	Rationale	Outcome included	Rationale
1	School Principal who participated in residential academy	Yes	Major stakeholder who can testify to medium term outcomes at the school	Yes	Information contributed to outcomes for School
2	School Educator who participated in residential academy	Yes	Major stakeholder who can testify to medium term outcomes at the school	Yes	Information contributed to outcomes for School
3	School Learners who participated in residential academy	Yes	Major beneficiary who can testify to medium and long term outcomes for the school and who are likely to experience significant outcomes	Yes	Information contributed to outcomes for School, but mostly for learners
4	Learners who participated in residential academy who are now employees of Merchants	Yes	Major beneficiary who can testify to medium and long term outcomes for the school and Merchants and who are likely to experience significant outcomes	Yes	Information contributed to outcomes for learners and little to Merchants as their time of employment has been short
5	Merchants ExCo members who participated in residential academy	Yes	Major stakeholder who can testify to medium term outcomes personally as employee at Merchants	Yes	Information contributed to outcomes for Merchants and employees
6	Merchants Leaders Forum members who participated in residential academy	Yes	Major stakeholder who can testify to medium term outcomes personally as employee at Merchants	Yes	Information contributed to outcomes for Merchants and employees
7	Merchants Future Leaders who participated in residential academy	Yes	Major stakeholder who can testify to medium term outcomes personally as employee at Merchants	Yes	Information contributed to outcomes for Merchants and employees
8	Merchants ExCo members who participated in residential academy and subsequently left Merchants employment	Yes	Major stakeholder who can testify to medium term outcomes personally as previous employee at Merchants	Yes, partially	Outcomes were included as relevant to the period before they left Merchants employment. It had valuable insights into potential future outcomes.
9	Merchants employees who did not participate in any residential academy	Yes	It was anticipated that these stakeholders experienced some of the same benefits but to a lesser extent than other employees	No	No substantial evidence of outcomes related to study

	Stakeholder Group	Interviewed	Rationale	Outcome included	Rationale
10	NGO: Rotary representative involved in Centurion College in on-going activities of post academy group activities	Yes	Stakeholder who can testify to medium term outcomes at the school	No	Information confirmed outcomes for school, did not double-count
11	Merchants employees who wanted to attend an academy, but who were unable to	No	Possible participation in future academies. Outcomes perceived at present to be same as those who did not attend	No	Included in general staff who did not attend academy, outcomes were the same
12	Dimension Data ExCo	No	Premature, will be important to include as audience of report	No	Premature to include as no influence yet
13	Customers/Clients of Merchants	No	Premature as clients are not yet influenced to an extend where they will have outcomes directly related to Columba Leadership Academy activities	No	It became clear that the influence on potential clients are expected, but not yet realised as the project is still new
14	Competitors	No	Premature as competitors might not yet be aware of the Columba Leadership Academy activities of Merchants	No	Same as above

The sizes of the different participant stakeholder groups and the types of engagement with each group are presented below in Table 2. The different instruments and interview guides used in the study is presented as Appendix D.

Table 2 Stakeholder Group Sizes and Type of Engagement

	Stakeholder Group	Size of group	Number consulted	Type of engagement
1	School Principal	1	1	Face-to-face interview
2	School Educators	3	2	Face-to-face interviews
3	School Learners academy 1	30*	1	Group discussion included 1 learner repeating grade 12
			2	Telephonic interviews with learners at University
	School Learners academy 2		2	Group discussion with 2 learners
	School Learners academy 3		2	Group discussion with 2 learners
4	Learners - new employees		3	Focus group at Merchants as new employees
5	Attendants –ExCo	3	3	Face-to-face x2
				Interviews – electronic x1
6	Attendants - Leaders Forum	15	9	Interviews (F2F or telephonic) x4
				Telephonic interview x2
				Electronic x2
				Interviews – electronic x1
7	Attendants - Future Leaders	9	6	Interviews (F2F or telephonic) x1
				Electronic x1
				Focus group x4
8	ExCo who attended and left	2	2	Face-to-face group interview
9	Staff who did not attend	40	5	Electronic surveys
10	Rotary	1	1	Interviews – electronic

* The total number of learners for the three academies that were included in this SROI was 30. Of these 3 learners were employed by Merchants and were interviewed and treated as part of the Merchants stakeholder group and 7 learners at the school were interviewed and treated as part of the School stakeholder group.

Interviews, conversations and other engagements were also conducted with other individuals. This was to gain an understanding of the intervention and to clarify outcomes and/or financial proxies. These included:
- Columba Leadership CEO
- Columba Leadership Head of Operations
- Columba Leadership
- Educators and administrator at the school
- Parents of learners (who indirectly represented the community)
- Merchant HR administrator
- Merchants staff members
- Review of Columba documents

3.5 The Investment

The Columba Leadership academy programme requires the investment of time and money from its corporate partners and schools to run successfully. The investment can range significantly across schools, individuals and corporates with the majority of the investment actually contributed by Columba's corporate partners.

This SROI analysis includes the investment made by Centurion College and its educators, volunteers and principal; as well as the investor, Merchants. Contributions that can be attributed to other organisations are considered in this analysis under the SROI filters, which is discussed in Section 3.7 below. The investment made by Columba Leadership and staff was not included as it is assumed to be covered by the financial contribution of the funding partner.

Below is listed the investment of each stakeholder group in the programme.

3.5.1 Merchants' Investments:

  i.   Financial investment made by Merchants as the funding partner
 ii.   Contribution of time by HR director: R4 500 daily salary x 15 days
iii.   Staff contributions of time per academy:

- Academy 1 in 2011:
  - R 4 500 daily salary for Exco members x 11 days invested
  - R 1 700 salary for Leadership Forum x 34 days invested

- Academy 2 in 2012:
  - R 4 500 daily salary for Exco members x 2 days invested
  - R 1 700 daily salary for Leadership Forum x 18 days invested
  - R 500 daily salary for Future Leaders x 15 days invested

- Academy 3 in 2012:
  - R 4 500 daily salary for Exco members x 2 days invested
  - R 1 700 daily salary for Leadership Forum x 18 days invested
  - R 500 daily salary for Future Leaders x 15 days invested

(Based on the following: Exco member salary: R 1 170 000, Leadership Forum salary: R 442 000, Future Leader salary: R 130 000)

3.5.2 Centurion College's Investments:

  i.   Centurion College's contribution of time for each academy:
  - R700 daily salary of educator x 2 educators for 5 days
  - R1000 daily salary of principal for 5 days – 2nd academy only
 ii.   Time of two Educators since October 2011 – 45 weeks x 2 hours/week (R87,50/hour):
iii.   Time of Principal at approximately 10 days per year: R10 000

Table 3 Time Invested by staff of Centurion College

Academy	Merchants investment	Merchants Time investment	School Investment	Total investment
1 (2011)	R150 000	R107 300	R7 000	R264 300
2 (2012)	R150 000	R39 600	R12 000	R201 600
3 (2012)	R150 000	R32 100	R 7 000	R189 100
Other 2011-2012		R67 500	R25 750	R93 250
Total	**R450 000**	**R246 500**	**R51 750**	**R748 250**

The most significant investment was made by Merchants. The school's investment amount is based on the time school staff members commit to supporting the youth group members.

Centurion College's investment doubled and tripled for the other two academies in the 2011 to 2012 period when The Principal of Centurion College became more involved. This illustrates how key figures within the stakeholder organisations can be pivotal to the success of the project. Also to be noted, one of the first educators used in the project has since decided to limit her involvement with post-academy groups..

The non-financial, social investment can be qualified by the longevity of the programme after the formal project, for example. Early evidence from the Columba programme suggests that the successful transition of Columban graduates is supported by:

- Commitment from key educators and adults in the school environment
- Complementary developmental and educational opportunities offered by other organisations operating in the school
- Bursary and employment opportunities offered by corporate partners

3.6 Outcomes

3.6.1 Period of Benefit
The investment period has been set as a one year period. The majority of the outcomes have been based on two years of impact and social value created. The total (maximum) duration of social impact for the sensitivity analysis is capped at five years which allows for the completion of schooling by learners who are directly or indirectly influenced by the intervention (four years of school for those in secondary school and an additional year period of securing employment or transitioning into higher or further education and training.

This period is also sufficient to gauge the impacts of the project on the culture within Merchants. The corporate will also be able to assess the impact on new business and client engagement in the proposed total period of 5 years.

3.6.2 Monetisation

Outcomes spectrum

The outcomes for the different stakeholder groups can be monetized, i.e. valued as a monetary amount. Some outcomes are immediate or can be included in the SROI calculation. Other outcomes will only occur in the future (there were at the time of the SROI investigations no evidence of the achievement of these expected outcomes) and these were only included in the "future sensitivity analysis". The table below lists and categorises the outcomes.

Table 4 Monetised Outcomes Key

	Immediate Outcome
	Medium term Outcome
	Potential future outcome
✚	**Included in SROI index calculation**
➡	**Outcome not yet evidenced**

Table 5 List of Outcomes with the category of monetisation

Group	Outcome	Indicator	Included in the SROI index
School	Improved relationship between Principal, Educators, Learners and Parents	# hours school remains open for study (to offer learners an environment that is conducive to studying)	✚
	Improved accountability/responsibility of Educators	# of teaching days that teachers are not absent from school (changes from previous years)	✚
	Improved patience and understanding of Learners' circumstances and differences	# of reported relationship improvements	➡
	Increased networking with local businesses	# of businesses actively engaged with the school since the start of the academy	✚
	Improved performance of Learners	% average grade marks improved	➡
	Improved standing of school in neighbourhood	*% improvement in Matric pass rate*	➡
	Development of school projects: new library and garden	*# of new projects initiated since the academy*	➡

Group	Outcome	Indicator	Included in the SROI index
	Improved Inter-school collaboration	*# of new collaborations initiated since the academy*	➡
	Development of community projects: OVC outreach	*# of community projects initiated since the academy*	➡
Learners	Increased self-awareness and self-esteem	*This becomes part of the story of change as this happens early on in the value chain creation*	
	Improved leadership abilities	# learners who take up leadership roles	✚
	Increased ability to transition into further education	# of learners who qualify and go on to further education	✚
	Increased feelings of learners that they want to contribute to others for greater good	# of learners returning to school to donate/contribute to the school	✚
	Improved relationships and value of others	*This becomes part of the story of change as this happens early on in the value chain creation*	
	Increased access to workplace and understanding of requirements for employment in formal sector	# of learners from the Academy employed after Matric	✚
	Improved ability to network (in problem solving)	*# of reported incidences of better problem solving*	➡
	Improved networking with other learners from "more privileged" schools, influencing those learners to contribute to community	*# of new relationships formed with other learners from "more privileged" schools*	➡
	Improved networking with other learners from "more privileged schools", influencing those schools to contribute to community	*# of learners from more privileged schools becoming involved in community*	➡
	Increase of Alumni involvement in community projects/mentorship to school learners	*# of alumni engaging in community projects*	➡
Merchants	Increased communication of CSR outcomes	This becomes part of the story of change as this happens early on in the value chain creation	
	Strengthening of relationship between business and school	This becomes part of the story of change as this happens early on in the value chain creation	
	Increased direct recruitment of new employees who already showed values like integrity	# of possible recruits in pool from Academies	✚

Group	Outcome	Indicator	Included in the SROI index
	Increased awareness of CSR outcomes by clients and industry	# of awards and media coverage received	✚
	Improved retention rates (reduced training of new recruits)	*# employees retained for more than x year*	➡
	Change in culture of organization	*# of reported observations of a change in culture*	➡
	Changes in company strategy similar to BBBEE – an indication of Merchants' integrity in its CSR engagements	*# changes in policies and strategies related to employment and youth opportunities*	➡
	Increase attraction of off-shore (international) clients through CSR outcome as differentiator	*# of new off-shore client leads since CSR inception*	➡
	Increase attraction of domestic clients through CSR outcome as differentiator	*# of new domestic client leads since CSR inception*	➡
	Changes in interaction and communication between different staff levels	*# of reported changes in interaction*	➡
	Improved standing of Merchants in Dimension Data CSR	*# of initiatives adopted/incorporated in other Dimension Data CSR programs*	➡
Employees	Increased self-awareness and personal growth of Leadership forum members	*This becomes part of the story of change as this happens early on in the value chain creation*	
	Increased self-awareness and personal growth of future leaders	*This becomes part of the story of change as this happens early on in the value chain creation*	
	Improved leadership abilities of future leaders	*This becomes part of the story of change as this happens early on in the value chain creation*	
	Increased promotion opportunities for Future Leaders	# of promotions of future leaders due to improved leadership (and living the values)	✚
	Increased awareness of disadvantaged youth as part of next generation workforce	# of employees acting in social responsible manner (e.g. doing community work, mentoring, etc.)	➡
	Improved personal relationships and engagement with entry level workforce	*# of new relationships formed*	➡

As indicated in the table 5 above, a substantial number of outcomes were not monetised. That is because no evidence of the outcomes could be found. These outcomes are still

considered important and should be included in future SROI analysis, and in monitoring activities. However, the sensitivity analysis includes the significant outcomes that were not yet evidenced, but that should be achieved in the next three to five years. See Appendix E for an Impact Map where the outcomes that are considered are monetised. Appendix F further explains the decisions regarding the inclusion or exclusion of each outcome with reference to the motivation and evidence source for each decision. Narratives of how each stakeholder group verbalised the outcomes and the linkages between outcomes are provided in the section on theory of change of each of the group (see section 4.2).

Most notably the following outcomes have not being included as part of this analysis, but have been tested in the potential future SROI analysis (please refer to the sensitivity analysis):

- Projects that have been planned, but are yet to be implemented in the school
- Long term results of networking by the school and learners
- Changes in Merchants' corporate culture and client engagement
- Changes in outcomes related to employee recruitment and retention
- Improved client relationships and attraction of new business from both local and international markets
- Improved standing of Merchants regarding CSR in the Dimension Data group
- Changes in socially responsible behavior of employees

3.6.3 Potential negative outcomes
Possible negative outcomes were investigated for the following stakeholders:

- There was some potential negative outcome for the ExCo members who attended the academy left Merchants and shortly after to start a new similar business identified. It was anticipated that there might have been negative outcomes for this group. They were then treated as a separate group to ensure that these outcomes (both positive and negative) will be captured. Although Columba Leadership were convinced that the fact that these two significant figures left Merchants and were able to start a business was an indication that the academy lead to improved ability to attract clients. Merchants were more concern with negative outcomes for the business, in that attending the academy led to the ExCo members resigning. None of these were relevant. Interviews with these two individuals confirmed the theory of change and expected outcomes for Merchants, especially regarding the personal benefits. However, they indicated that them leaving were not a consequence of attending the academy.
- Negative outcomes were also expected for the group of staff who wanted to attend an academy, but were not accommodated. Initially it was thought that this group might have negative outcomes such as feeling some resentment. After discussions with some staff who did not attend, it was clear that they had an expectation of attending an academy in the future and was not influenced in any negative manner. There outcomes were the same as the general staff who did not attend (without applying) any academy.

3.6.4 Outcome quantity and duration
The following table 6 describes the motivation about quantity for each outcome indicator and the duration of each.

Table 6 List of Quantity and Duration for each outcome indicator

Group	Outcome	Indicator	Quantity	Rationale	Duration (years)	Rationale
School	Increased networking with local businesses	# of businesses actively engaged with the school since the start of the academy	1	One business (the Hotel) was networked with	2	The principal anticipated that the Hotel will continue to provide the space for 2 years
School	Improved accountability/responsibility of Educators	# of teaching days that teachers are not absent from school (changes from previous years)	15	The principal estimated that 15 teaching days will be gained (5 days for three teachers)	2	The principal has the commitment of the teachers to maintain this trend, but expects it to last about two years
School	Improved relationship between Principal, Educators, Learners and Parents	# hours school remains open for study (to allow those learners that do not have space at home to study)	1800	8hrs per week * 45 weeks * 5 teachers who committed	2	The principal has committed to two years, but expects it to be longer when learners and teachers realise the value
Learners	Increased access to workplace and understanding of requirements for employment in formal sector	# of learners employed after Matric	3	In addition to the three learners who were employed by Merchants, another three indicated that they are empowered to apply elsewhere with more success	2	Average job tenure in call centre according to Merchants HR manager
Learners	Increased ability to transition into further education	# of learners who qualify and go on to further education	4	The school reported that four learners accessed further education, including two at universities.	1	This outcome is for the time when decisions, applications and registrations are made for further education
Learners	Increased stewardship for greater good	# of learners returning to school to donate/contribute to the school	1	One of the learners reported that she went back to school to donate her school uniforms	1	This is a once of event that will benefit a learner for approximately one year (of wearing the uniform)
Learners	Improved leadership abilities	# learners who take up leadership roles	10	The principal and educators reported that 10 learners are now more active as leaders at the school	1	The principal expected this to last for a year without new interventions to re-activate it.
Merchants	Increased direct recruitment of new employees who already showed values like integrity	# of possible recruits in pool from Academies	3	Three learners were recruited successfully by Merchants	2	Average job tenure in call centre according to Merchants HR manager
Merchants	Increased awareness of CSR outcomes by clients and industry	# of awards and media coverage received	3	The HR manager of Merchants received three awards	2	The HR manager estimated that the effect and value of the awards and its marketing value will last for two years

Group	Outcome	Indicator	Quantity	Rationale	Duration (years)	Rationale
Employees	Increased promotion opportunities for Future Leaders	# of promotions of future leaders due to improved leadership (and living the values)	3	The HR manager indicated that three future leaders were identified to be promoted	1	The advantage of the promotion would probably give them a one year lead

3.6.5 Financial proxies

The following table indicates the financial proxies identified and valued for each of the outcome indicators. Verification of the appropriateness of each proxy was done by triangulating sources.

Table 7 List of Financial Proxies

Group	Outcome	Indicator	Financial Proxy	Rationale	Value of the change	Rationale	Information source
	Increased networking with local businesses	# of businesses actively engaged with the school since the start of the academy	Cost of putting on school activities	The principal indicated that the value of the networking was the space that it created for the learners. Without the space the learners need to be transported to another venue. The other proxy was the rental value of the space (but this would not give a clear indication as it is a high density area and value of properties not proportional.	R 30,000.00	Average R3000 per month (10 months excl. 2 months of holidays) for bus transport - R3000 for half day/50 persons (or alternatively R2000/month flat rental)	Estate agent/Local transport company
School	Improved accountability/responsibility of Educators	# of teaching days that teachers are not absent from school (changes from previous years)	Teacher salary	Daily rate of average teacher salary	R 634.00	Annual salary ranges between: R84 000-250 000 - median R153 000 (Secondary School)	Pay scale from Department of Education (updated 17 March 2013)

Group	Outcome	Indicator	Financial Proxy	Rationale	Value of the change	Rationale	Information source
	Improved relationship between Principal, Educators, Learners and Parents	# hours school remains open for study (to allow those learners that do not have space at home to study)	Hourly salary of a teacher	Hourly rate of teacher salary	R 87.00	Annual salary ranges between: R84 000-250 000 - median R153 000 (Secondary School)	Pay scale from Department of Education (updated 17 March 2013)
Learners	Increased access to workplace and understanding of requirements for employment in formal sector	# of learners employed after Matric	Salary of new employees	Merchants salary scale for entry level staff	R 78,000.00	R6-7000 (before tax /per months) R78 000 per year before tax	Merchants HR manager and confirmed by finance manager
	Increased ability to transition into further education	# of learners who qualify and go on to further education	Cost of degree course (1st year)	Value of transit from school to further education is the cost of the first year tuition	R 31,000.00	Average degree costs (2013)	Online from University of the Witwatersrand
	Increased stewardship for greater good	# of learners returning to school to donate/contribute to the school	Uniform and books (used)	Second hand uniform and books for matriculant	R 1,000.00	Advertised for R 1000.00	The Citizen newspaper classifieds
	Improved leadership abilities	# learners who take up leadership roles	Rate of assisting with homework	The learners indicated that the value of them showing leadership equals the value of a learner assisting another with homework for 2 hour per week at R55/hour	R 5,720.00	Ranged between R50 to R170 per hour. Took lowest rate as the assistance will not be from an expert	University of Johannesburg student, gumtree

Group	Outcome	Indicator	Financial Proxy	Rationale	Value of the change	Rationale	Information source
Merchants	Increased direct recruitment of new employees who already showed values like integrity	# of possible recruits in pool from Academies	Cost of recruiting a person through current route	The cost saving to Merchants to recruit one employee at entry level was regarded as the best proxy by the HR manager	R 8,500.00	R8500 Quest and R8-9000 by Flexitemp	Recruitment agencies (Quest and Flexitemp), confirmed by Merchants HR manager
Merchants	Increased awareness of CSR outcomes by clients and industry	# of awards and media coverage received	Use advertising value half page in a similar magazine	The marketing value was deemed the same as a magazine advertisement. Marketing manager confirmed that proxy of HR manager was valid	R 24,000.00	Full page ad = R47 000, Half page ad = R24 000	Advertising value of similar business publication
Employees	Increased promotion opportunities for Future Leaders	# of promotions of future leaders due to improved leadership (and living the values)	Change in salary	Value of difference between salaries of the two positions	R 52,000.00	Difference in salary scale is R52 000 per annum	Merchants HR manager

3.7 The SROI Filters

Not all of the social value added (SVA) can be solely attributed to the programme. Some benefits may be a consequence of other initiatives by other organisations. A number of key filters were applied to ensure a realistic view of the social benefits created by the programme. These include:

I. **Deadweight** is an estimation of what would have happened if the Columba programme had never been implemented. Most of the outcomes for the school or learners would not have happened if not for this intervention as this is a very poor school with very limited resources and opportunities. The three outcomes where deadweight was important and was applied is:
   a. The improved relationship between principal, educators, learners and parents: Deadweight of 35% was allocated as the learners, educators and principals felt that there was a change that this might have happened without the intervention.
   b. The greater probability to transition to further education: As the learners that transitioned themselves indicated that they most probably would have entered further education without attending the academy a deadweight of 80% was allocated.
   c. Deadweight of 60% was allocated to the increased awareness of CSR outcomes by Merchants clients and industry as measured by the awards and media coverage received. Most of the value was attributed to other marketing strategies and other CSR activities (other than the Columba Leadership investment.

II. **Attribution** accounts for the percentage of outcomes caused by other organisations or people. The Columba programme and Merchants' involvement is unlikely to be solely responsible for the value creation calculated.

   - A 40% attribution was included to account for unemployment rates. This represents the median value reported by the SA Institute of Race Relations for the rate of employment for SA for youth (ranging between the total unemployment rate of 29.6% and 51% for those between 15 and 24 years old).
   - A 40% attribution was also included for the value assigned to the increased ability to transition into further education. The learners indicated that they are supported by their families and have been motivated by factors other than the Columba Leadership academy. They indicated that the family and other factors contributed about 40% to them being able to transit to further education.
   - The learner who reported increased feelings to contribute to the greater good of other and subsequently donated her uniform and school books also indicated that her feelings of loyalty to the school motivated her to an extent. She agreed to a 40% attribution.

III. **Displacement** is an assessment of how much of the activity displaced other outcomes. There were no adjustments made in this study for any of the outcomes. None of the outcomes were reported by any of the stakeholders (they were explicitly

asked in the interviews as evident in the instruments used) to displace any outcome not related to the Columba Leadership intervention.

IV. **Drop-Off** is a measure which recognises that outcomes could tend to reduce over time. Given that the impact of the programme will be sustained by the 3rd academy (that was not fully included in the analysis due to the short time since the academy) and the impact is not regarded by any of the stakeholders (including Columba Academy) to reduce over the two year period, no drop-off adjustment has been applied. It has been adjusted in the sensitivity analysis to test this assumption (to 50% for all outcomes) with little effect on the ratio (see section 4.5.4).

The discounted rate was set at 11.5% based on data from the Central bank discount rate for SA: 7% (31 December 2009) or 11.5% (31 December 2008)

3.8 Ensuring stakeholders and outcomes are relevant and significant (material)

The following methods were employed to make sure that the relevant stakeholders were included initially:

During the first meeting and extensive list was made of all possible stakeholders. These were categorised and presented to the steering committee that discussed the stakeholder groups and further advised on stakeholder groups to be included. Additional changes were later presented to the team as it became evident that these groups were not yet influenced e.g. Dimension Data (the mother company of Merchants). All these were discussed in the regular meetings held with Merchants.

One stakeholder group that was not included after considerable discussions was Columba. It was considered that there are outcomes for Columba (e.g. learning regarding their own implementation activities), but it was felt that as an implementing agency their outcomes are not considered part of the scope of this study. Merchants felt that the outcomes are important and that Columba is an important audience and contributor, but that they received the input-resources of the academies and that outcomes are therefore a direct output (product) rather than an outcome that contributes to Merchants CSR. However, Columba Leadership staff members were included in discussions and steering committee meetings to ensure that unexpected outcomes were included and that their expectations regarding outcomes for learners and other academy participants were included. They contributed to discussions on inclusion and exclusion of stakeholders and outcomes.

During the SROI process the one stakeholder group was combined with another (Staff members who expressed a willingness to attend an academy). This was done when it became clear that the fact that they expressed a wish to be part did not influence their outcomes.

Outcomes and indicators for each were developed in collaboration with the stakeholder groups during engagements with each group as presented earlier in the report and in Appendix F. These were refined and evidence investigated for each. Some indicators were not evidenced (significant) and although certain stakeholders expected these it was clear that these were not to be included. This was conveyed to the relevant stakeholders and the steering group. It was not considered a negative finding as these expected outcomes were

included in the recommended monitoring indicators to be followed in future activities and a sensitivity analysis could show the value of achieving this in future. For example: Very little value was found for potential clients of Merchants at this stage and an overestimate of the value to the general employees of Merchants. According to the researcher judgement these were excluded for the present analysis, but included to illustrate the potential value through an additional sensitivity analysis.

Some outcomes were combined and others deleted due to the fact that the outcomes were early in the results chain and the outcomes further in the chain were accounted for and valued as part of the analysis. If these were included it might have led to double counting. For example: For learners "Access to employment" was not included for those who were employed as they have outcomes realising further in the results chain.

Some outcomes were included for the future sensitivity analysis, but there were no evidence that they were realised at the time of the analysis. The outcomes were retained (but not valued) as the report also served to guide future monitoring activities (and these outcomes are expected to realise in future).

Stakeholders were therefore involved in initial discussions on relevance of inclusion of stakeholders, indicators and outcomes for each group; decisions were made by the research team and shared with the steering committee. Transparency regarding decisions and judgements were important throughout the process.

4. The Social Return on Investment Results

4.1. Overview of Social Value
The calculated values of various outcomes for the specified stakeholders are outlined below.

Table 8 Social Investment Overview

Stakeholder	Outcome	Indicator	Financial proxy	Value (R)
School	Increased networking with local businesses	# of businesses actively engaged with the school since the start of the academy	Cost of hosting school activities	R 30 000
	Improved accountability/responsibility of Educators	# of teaching days that teachers are not absent from school (changes from previous years)	Teacher's daily salary	R 634
	Improved relationship between Principal, Educators, Learners and Parents	# hours school remains open for study (to allow those learners that do not have space at home to study)	Hourly salary of a teacher	R 87
Learners	Increased access to workplace and understanding of requirements for employment in formal sector	# of learners employed after Matric	Salary of new employees	R 78 000
	Increased ability to transition into further education	# of learners who qualify and go on to further education	Cost of degree course (1st year)	R 31 000
	Increased feelings of learners that they want to contribute to others for greater good	# of learners returning to school to donate/contribute to the school	Uniform and books (used)	R 1 000
	Improved leadership abilities	# learners who take up leadership roles	Rate of assisting with homework	R 5 720

Merchants	Increased direct recruitment of new employees who already showed values like integrity	# of possible recruits in pool from academies	Cost of recruiting a person through current route	R 8 500
	Increased awareness of CSR outcomes by clients and industry	# of awards and media coverage received	Use advertising value half page in a similar magazine	R 24 000
Employees	Increased promotion opportunities for Future Leaders	# of promotions of future leaders due to improved leadership (and living the values)	Change in salary	R 52 000

4.2 Theory of Change

The theory of change defines the interconnectedness between the overall outcomes. Each theory is based on a chain of events taking place, using the results of the previous outcomes as a foundation.

The following diagrams present the Theory of Change (Value Chain) for each stakeholder group. Those outcomes highlighted in grey are expected to occur in the longer term and have not been monetised due to a lack of evidence at this stage.

4.2.1 School: Centurion College
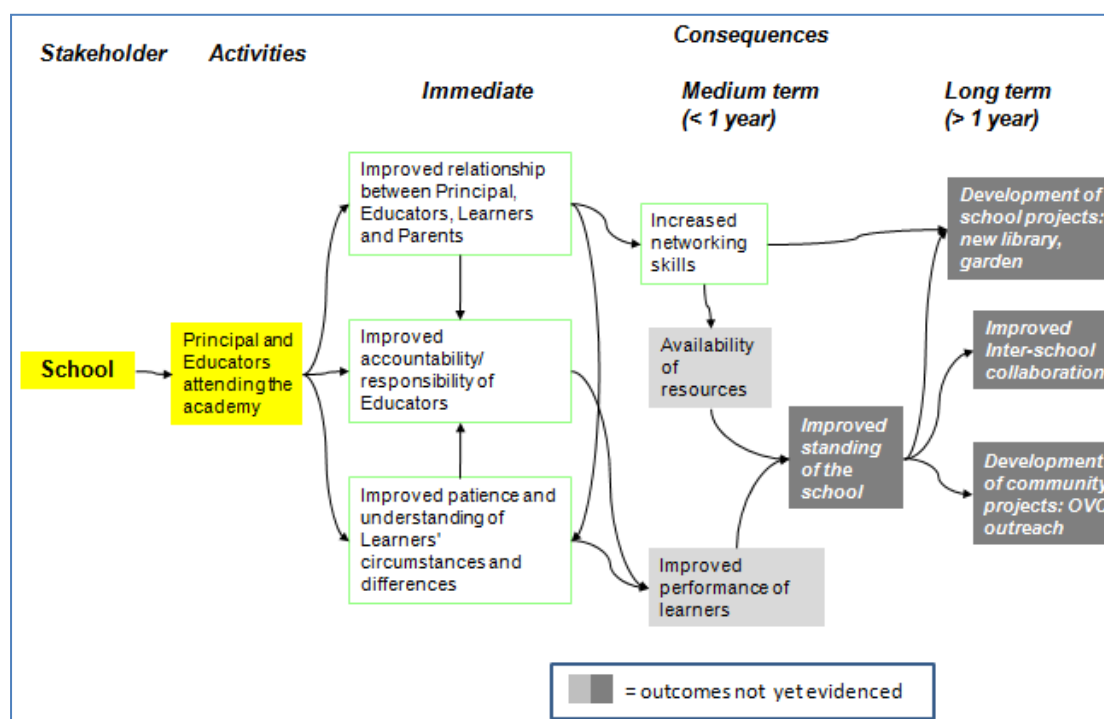
Figure 10 Value Chain for School

Immediate Consequences
Certain outcomes were achieved immediately, whilst participating in the programme. Without these results the academy would not be deemed successful.

Improved relationship between Principal, Educators, Learners and Parents

> *"Different types of relationships improved (e.g. with parents, educators) and this mirrors what we need to do in life."* (Learner)

> *"I now see the learners differently. You know they can teach us so much."* (Principal)

The participation of the Columba Academy facilitated improved communication between those in attendance. The principal and educators noticed that they were able to view the learners in a more

positive light. They were able to consider the learners to be resourceful and as having the potential to contribute significantly to their learning and the school and communities. This improved the relationships between all of the parties involved.

> "*The camp helped me to understand the kids better; I'm passionate about the learners as they are leaders of the future.*" (Principal)

The principal made significant changes to her interaction with learners, educators and parents. She adopted an "open-door" policy which is already reaping results.

One example of the value of improved relationship between the Principal and parents is an incident that happened just as the research team arrived at the school. The Principal had a conversation with a couple to convince them to place their child in a previous grade. The learner was not making progress because of a lack of English skills.

Previously, the principal would have avoided the interaction and would therefore have lost the opportunity to explain her difficult (but ultimately most beneficial to the learner) decision to the parents. Her being available for the conversation built the trust of the parents in the school to take the best interest of their child at heart and also improved the situation for the learner.

Another very significant example is the ability of the principal to negotiate with the educators to keep the school open for a longer period from Monday to Thursday each week. She had noticed that learners were not able to complete their homework due to a lack of space at their residences. Many of the learners stay with other families in small flats. The rooms are subdivided by curtains to house more than one family. It is extremely difficult for learners to study in these circumstances.

The principal saw an opportunity to keep the school open to allow these learners the physical environment conducive to studying, but had to also ensure the buy-in from educators who now had to spend additional time at the school to provide assistance and supervise the learners. This became accepted practice at the school and has now been negotiated to also include Friday afternoon school for matriculants.

Figure 11 Ms Ramaisa, Principal of Centurion College

This outcome was important in calculating the SROI and the indicator used was the number of hours that the school remains open for study (to allow those learners that do not have space at home to study). It also contributes to other medium and long term outcomes such as networking skills with business and increasing the resources of the school.

Improved accountability of educators

Another immediate outcome from the academy was the improved accountability and responsibility of the educators who attended the academy. The educators became more attentive to and available for the learners. An important indicator of educator commitment is a decrease in absenteeism, which is currently a very important issue discussed widely in South Africa. The number of teaching days that teachers are not absent from school (changes from previous years) were therefore used as an indicator for this outcome. The improvement in responsibility of the educators is fundamental in improving learner results and, ultimately, in the improved reputation of the school.

The outcome is also closely related to the fact that the educators were more patient and understanding of learners' circumstances and differences. This was evident to both learners and educators. There is a clear expectation that it could lead to improved learner results. It is also related to the improved relationships between various role players at the school.

> *"I became a more caring person. I now answer questions on sensitive issues that I never used to do. I am committed to my work as an Educator."* (Educator)

An important aspect that was not mentioned as a result at present, but that could serve as an important indicator for the future is the changes in school discipline. This will be the combined effect of improved learner participation and educators being more committed to their teaching profession. It will need to be cascaded to other Educators and learners besides those who attended leadership academies.

Improved patience and understanding of Learners' circumstances and differences

This outcome was not monetised as it is an early result in the value chain. It further forms part of the indicator "time that the school remains open to learners" due to the understanding of the learners' circumstances such as a lack of resources (e.g. space) for learners to do homework.

This patient outlook is also expected to significantly contribute to the performance of the learners in the classroom. Educators are more committed to education as a vocation rather than a job. The cascading effect to influence educators who did not attend the academy is expected to occur in future.

> *"I am more open to learn from the learners and to accommodate staff. I learn a lot from the learners."* (Principal)

> *"We have three children from another African country staying by themselves. The oldest one takes care of the others, he has to go to the airport and collect the money the parents sent to keep them going. This child is a parent to the other two who are still very small and he has to do school work. Now we all understand better."*

Medium Term Consequences
Increased networking with local businesses

The principal indicated that a key learning was her improved leadership abilities. It enabled her to identify opportunities for growth and to network with the relevant persons to achieve these goals. A direct result of these learnings is the increased number of potential resources available to the school.

One example that illustrates this outcome is related to the networking with a local hotel. The area in which the school is located is a densely populated area with high-rise buildings. There is limited open space available and the school property only allows for the school building itself (a multi-story structure). There is not much space for outdoor activities or space to assemble all the learners.

The principal approached a local hotel to request the use of an additional parking area to host was school events – at no cost. The school is able to host events at a low cost while raising its profile in the community. It further enables the school to be more integrated into the local community.

Figure 12 The parking area (behind the fence)

Improved standing of the school

Most of the outcomes will lead to an improvement of the reputation of the school. This includes activities and involvement from various stakeholders such as networking by the Principal, environmental cleaning by the learners and improved learner results (grade marks as well as matric results).

The matric results of the school improved in the past three years:

- 2010: 52%
- 2011: 71%
- 2012: 81% (first Columba academy group matriculated)

In 2013, the principal aims for a 100% pass rate, which seems likely to be achieved. There are 38 learners in matric of whom only six failed the 1st semester. One learner achieved distinctions in almost all her subjects.

> *"The reputation of the school improved and we get more people interested to enroll their children."* (Principal)

Long Term Consequences
Improved inter-school collaboration

An indirect result of the establishment of the Rotary Interact Club at the school is the interaction with other schools. Schools that were mentioned as possible collaborators included some of the most prominent and prestigious schools in Johannesburg.

It is anticipated that these partnerships could lead to numerous positive outcomes. Firstly, the learners are hoping to inspire, motivate and initiate community involvement by the other school. Secondly, the schools might share resources with the Centurion College such as the schools' well-developed sports grounds and equipment. Thirdly, there is a wish that the schools might become involved in Centurion College and that through this relationship, learners with potential (e.g. possible sport stars) might obtain bursaries and sponsorships to study at the school.

> *"Due to our involvement with Rotary we could connect to other schools. We rub shoulders with schools such as St Johns and Queens. They also now started projects. They were inspired by this poor school from the inner City. Perhaps one day they will offer some of Centurion learners scholarships or bursaries to also study there, especially those who are good in sport and did not get any opportunity at Centurion."* (Previous Learners)

Development of school projects: library and vegetable garden

The new library is being developed in an unused venue at the school. Donations from Merchants and Rotary are making a huge difference, but the greatest value has been the contribution by the learners themselves. The learners obtained donations of paint, materials and carpets from various donors. They have since cleaned and painted the room and have assisted with laying the new carpet. Their active participation enhanced their ownership and support of the project.

Figure 13 Poster of library development at Centurion College

"*The library will be our legacy at the school. Learners who do not have the opportunity to experience the academy themselves should also have something of such great value.*" (Previous Learner, part of first academy)

"*This will be our legacy that we were at this school.*" (Current Learner)

Figure 14 Mr Jamba (Value champion) in the Library

Figure 15 A cupboard of donated books

Another project that is currently being executed is the development of a roof-top tyre *vegetable garden*. With the aid of Rotary, the learners are taught how to start a small garden in old car tyres.

Each learner will be responsible to maintain his/her own garden. The tyres were placed in the only available space at the school - on the roof.

The learners anticipate selling the fresh vegetables to the local community. This would not only provide an income to the school (learner-group), but will also be a source of cheaper and fresh vegetables to the needy persons in the community.

. The library and garden were not yet functional at the time of the study and were not included in the value calculation. But since these are significant projects for future impact calculations it was included in the sensitivity analysis.

Development of community projects: Environmental clean-up and OVC outreach

The learners are involved in other community projects that will also be expanded in the near future. These include outreach to Orphans and Vulnerable Children (OVC) in orphanages, a recycling project focussing firstly on paper and then other items and the ALEC (Anti-Littering Environmental Campaign) project. The ALEC campaign involves the learners cleaning the immediate area outside the school on Friday afternoons. This improves the image of the school and teaches ownership and responsibility to the learners.

"The reputation of the school improves." (Learner)

"People can walk and feel better about the streets being clean." (Learners)

Figure 16 Friday cleanup activities

4.2.2 Residential Academy Learners: Centurion College
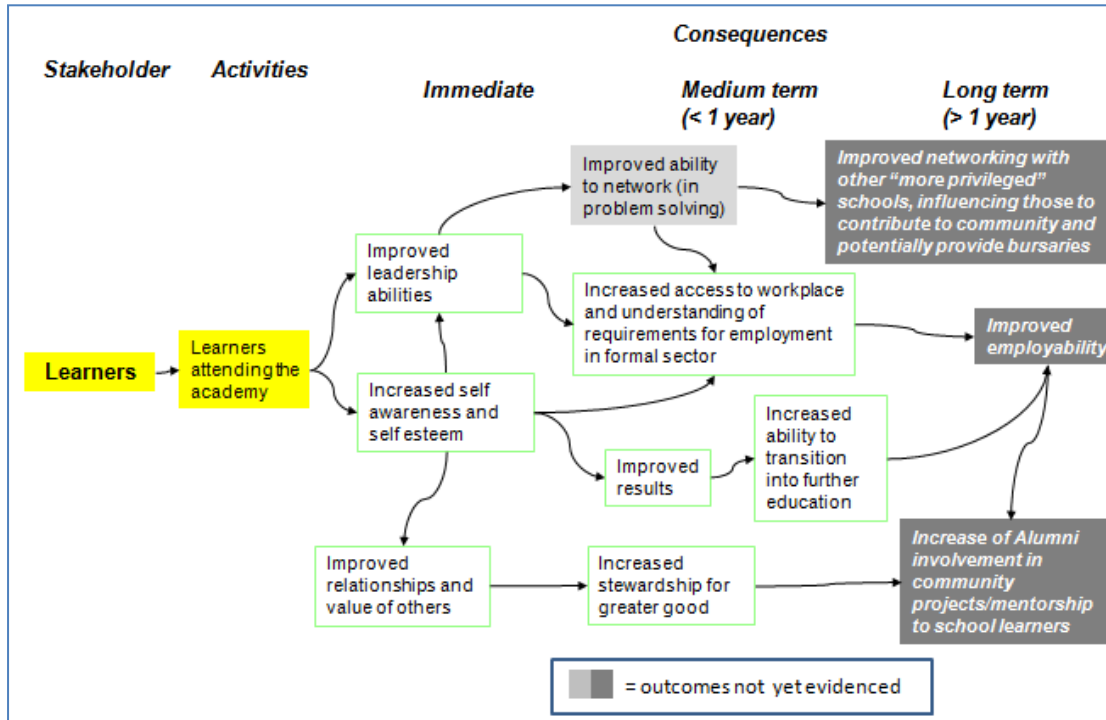
Figure 17 Value Chain for Learners

The following outcomes were mentioned as the important changes that happened as a result of participation of the academies by the learners as the ultimate beneficiaries of the programme (end-users). See Appendix G en H for the data on Learners responses (including the learners who were subsequently employed by Merchants as they also contributed to understanding the outcomes of the learners group).

Immediate Consequences
Increased self-awareness and self esteem

According to the Columba Leadership the first and most immediate outcomes of the academy is increased self-awareness and self-esteem, improved relationships and improved leadership skills.

The learners reported an increase in self-awareness and self-esteem. These changes are very significant and are the foundation of the other outcomes for this stakeholder group. It is, however, not included in the SROI because it happens early in the value chain and is represented in other "later" outcomes that are monetised accordingly.

One very important example is that of one learner who failed matric last year and has to repeat the year to graduate. This often has devastating effects on a learner, yet this learner reported that she not only managed to assert herself, but also inspired other learners. She is determined to succeed. She was taught resilience, an important life-skill.

Other learners also reported that this increase in self-awareness has a positive impact on learning.

"I now have an improved attitude towards learning. This is 'lifelong learning' till I am 60 years old." (Learner)

Improved relationships and value of others/ empathy

Similar to the increased self-awareness, learners report improved relationships and value of others. This includes other learners, but also valuing educators, the principal and others who attended the academy and also learners who did not attend.

"We are able to communicate across 'borders' – with students of other countries." (Learners)

Improved leadership abilities

A direct and immediate effect of attending the Columba Leadership academies was the improvement of leadership skills. It also plays a critical role in the other long term outcomes. For example, the learners reported that they, on returning from the academy, planned for different projects for the school. These projects might not be fully activated at present, but will make significant contributions to the school and the community once fully operational.

The first project was the establishment of the Rotary Interclub. The first group of learners returned from the academy and assessed their project plans. They identified the biggest challenge as the lack of structure. Through the networking skills of one of the learners, they contacted Rotary. A key individual at Rotary has been instrumental in setting up the club at the school and arranging access resources for the projects.

Figure 18 Bi-weekly meeting of the Rotary Interact Club

The initial group of learners were expanded by including the second academy. And then, a testament to their leadership abilities, learners who were not included in any leadership academy were involved in the group.

"We also had to organise other grades to help pick-up litter after break. We could not do it alone although we tried." (Learners)

Medium Term Consequences
Improved ability to network

Linked to leadership ability is the ability to solve problems. Learners were able to tackle challenges they were presented with by identifying key aspects of the problem and utilising the networking skills they'd learned. Networking enabled them to use another organisation's structure to frame their projects. For example, using networks of Rotary and the personal contact of a learner they were able to start a project to develop a library for the school and a vegetable garden.

> *"We learned how to network; this will be very useful throughout life."* (Learners)

> "*The learners learned how to network; it feels so good to see that they really applied this knowledge to get Rotary on board."* (Merchants Future Leader)

This outcome was not monetised as it appears early in the value chain and would be double counted if also included. The outcome is also linked to the long term outcome of inter-school collaboration that could possibly contribute to future community projects as well as individual benefits for learners (e.g. scholarships) as described in the previous section.

Increased access of workplace and understanding of requirements for employment in the formal sector

The learners returned from the residential academy with a new understanding of leadership, self-awareness and self-esteem. Most of this was attributed to "living the different values". These different aspects combined with the continued involvement of Merchants contributed to learners having the confidence to approach a variety of work places to learn about employability.

Merchants actively participated by hosting events such as the national "bring-a-girl-child-to-work" campaign and an on-site visit to one of Merchants business units by a group of learners for a business assignment. The learners reported increased insights into how to develop their Curriculum Vitae, requirements for entry level employment and learnerships and other aspects that would increase the learners' ability to apply for employment.

> "It was very valuable to see the 'workplace', not only for being employed, but also to get insight into what is required to be employed."

> "We understand the value of a business beyond handing out bursaries, they (Merchants) exposed us and prepared us for work life."

> "I look forward so much to my first day at work."

> (Various Learners)

Increased ability to transition into further education

It is not only the improvements in self-awareness, self-esteem and learners' marks (exam results and matric results), but also other aspects such as the outcomes on school level (increased educator responsibility) that contribute to the overall increase in the number of learners who will be able to access further education in the future.

No direct causal contribution could be assessed regarding the influence of the Columba Leadership academies on learners accessing further education at the time of the study. This is due to the fact that only one group has matriculated since the first academy at the school. However, significant changes have been observed in that some learners decided to attend Star Schools in order to improve their matric results to enable them to access further education.

The outcomes related to access to workplace and further education (in combination with personal aspects such as self-awareness and leadership abilities) should in the near future contribute to increased *employability* of other learners. Currently, Merchants has employed 3 learners. The outcome is described under Merchants and the value calculation included there. It is not only anticipated that more learners will access employment, but also that it will be at a variety of workplaces.

Increased feelings of learners that they want to contribute to others for greater good

It is anticipated that learners will contribute to society in a meaningful way as individuals and not only in the group at school. These activities could be short-term contributions or prolonged involvement with a variety of beneficiaries.

One example of evidence of such a positive outcome is the donation by a past learner (matriculant of 2012) of her school uniform and books to the school. This not only assisted an underprivileged learner, but also motivated many learners. It is anticipated that these types of contributions will increase in future.

Long Term Consequences
Increased Alumni involvement

This outcome is linked to the previous outcome and specifically involves the longer term and continuous involvement of learners (after they have matriculated) with the school and community. It is anticipated that Alumni of the school will make contributions to other communities and that some of them will return to the school as teachers or independent mentors.

Mentorship was a very common theme amongst different stakeholders. Being mentored enabled the learners who were newly employed by Merchants to actualise their dreams. They reported having different mentors (businesswoman and a Merchants employee) who assisted them with personal issues and career development.

Although the academy attendees are as yet not ready to fulfil a mentoring role at the school, they have already expressed an interest to return to the school to mentor other learners. However, it is still a significant contribution to be considered a role model and a source of inspiration by their peers.

> *"I would like to go back to the school and motivate other students who are in the same situation; same as happened with me, also go back to the camp and motivate other learners. I*

want to share my experience with others, and mentor others as I personally have someone who has a strong influence on me." (Past Learner)

4.2.3 Merchants
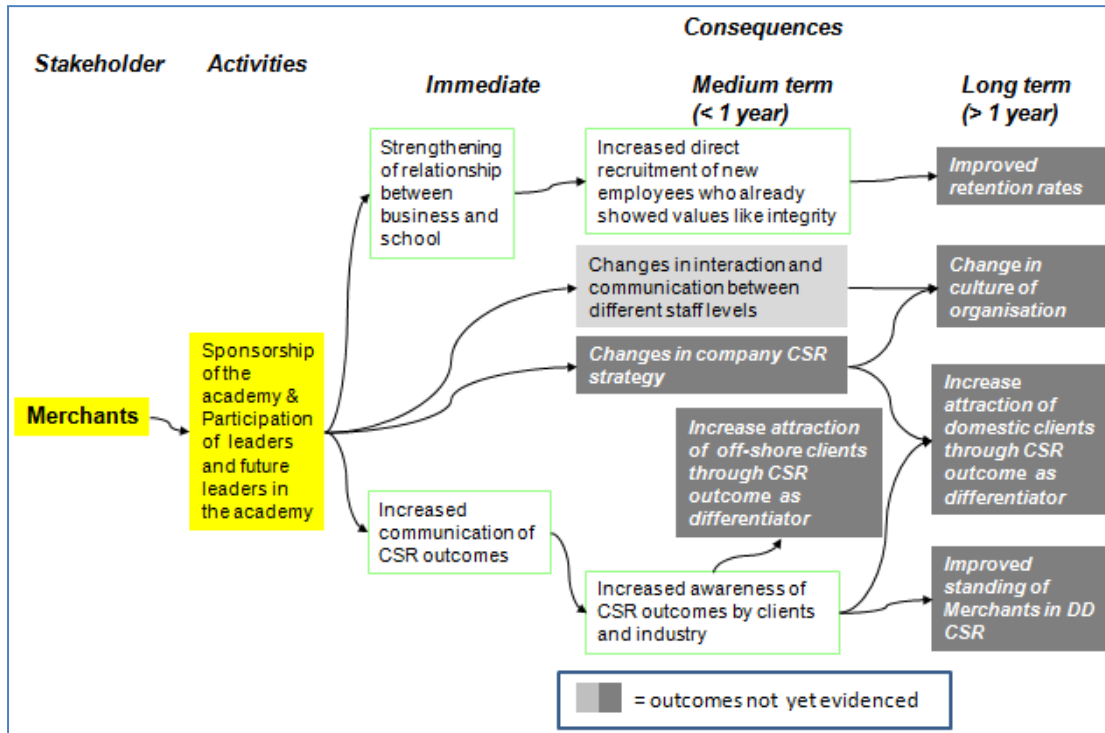
Figure 19 Value Chain for Merchants

Immediate Consequences
In order to achieve medium and longer term outcomes some immediate results were needed.

Within 18 months Merchants established a strong relationship with the school. This is a critical result to obtain. It is not monetised as it is the initial step in a value chain and its value is included in subsequent outcomes. Similarly important is the communication of Merchants CSR outcomes. This SROI report will enable detailed and evidence-based communication both internally at Merchants and externally with the target market, all of which will supplement current communications.

> "*Following the Academy I also observed a significant transformation in the conversations taking place around our boardroom table. As an executive team we were cautious about South Africa now we are positive. We talk about our core purpose being a vehicle for job creation and the development of the future leaders of this country; the name of Columba's leadership is regularly part of these conversations.*" (Merchants' HR Director)

Medium Term Consequences
Increased direct recruitment of new employees who already showed values (like integrity)

Merchants was able to establish an alternative avenue to recruit new agents. The majority of recruitments are done through agencies. By being able to access a pool of potential employees directly, Merchants was able to save recruitment fees.

There is also the aspect that by recruiting from existing relationships, the presence of values that are important to the organisations (e.g. integrity) has already been assessed during the programme. There is a greater level of confidence in the recruitment process.

Three employees were already recruited from the Centurion College. This proved that Merchants "walk the talk" when it comes to the business focus on youth empowerment and development. It will further inspire the staff members in general and the clients specifically.

"Merchants is a company that assist people and help them to grow." (New Employee)

Increased awareness of CSR outcomes by clients and industry

The conversations, discussions and dissemination of information on the CSR activities (including Columba Leadership contributions and results) have already stimulated interest in Merchants. For example, two awards can be attributed to this increased communication, i.e. the IPM Best HR Director Award 2012 (for Ms Victoria Ward) and Best Employer Award 2012/13.

Merchants was also approached to be included in a 10 page spread for the publication, African Business Review. The article; the increase in personal and business conversations around CSR; and the results of the Columba involvement directly led to an enhanced profile of Merchants. This company culture differentiator of Merchants is expected to increase in the future and to lead to an increase in business opportunities and contracts.

"The client showed great interest in the Columba academy after exposing them to the outcomes of the academy." (Leadership Forum)

Figure 20 IPM Best HR Director Award 2012 (for Ms Victoria Ward) and Best Employer Award 2012/13

Changes in company CSR strategy

Merchants has already demonstrated that the company does not include BBBEE as compulsory aspects of business strategy to legally comply with, but honestly aims to achieve its goals.

At the time of the study no evidence was presented to confirm that similar results have been achieved regarding stipulating CSR strategy, but it is clear that policy changes and formal strategic changes will be implemented. These will not be only communicated changes in policies, but is already being implemented by the business. Documentation will merely formalise the changes that occurred already regarding CSR goals.

Long Term Consequences
Improved retention rates

Retention rates can possibly be improved in two ways - both linked to the Columba Leadership academies. Firstly, when recruiting and employing agents directly from sources such as Centurion College, the recruitment decision is based on relationships that have already been established with the candidates. Employees have built relationships in their work environment are more inclined to remain at their workplace for longer periods. Secondly, by nurturing a culture of social responsibility and personal growth, Merchants is increasing its offer proposition.

> "I *achieved a lot in a short time, my attitude towards Merchants has changed specially with my situation/background, and I now appreciate my job more."* (Future Leader)

Changes in culture of the organisation

To effect cultural change in a company, various other outcomes will have to be achieved. Communication between different staff levels (especially regarding CSR activities and results) will have to be enhanced; changes in the CSR strategy will have to be implemented. This is a very long-term outcome that will depend on many internal and external factors. Business units differ with regard to culture. However, some units such as the SAA Call Centre already have a culture that promotes Merchants' goals in this regard.

Increased attraction of off-shore and domestic clients through CSR outcomes as a differentiator

The aim is to interest clients as a company that is concerned about its people and communities foremost. This is how Merchants intends to differentiate itself from similar service providers. This project will complement that intention after CSR results and impact is clearly communicated to the target markets, including clients and competitors.

Although no new clients have been solely attracted as a result of this initiative, this will probably be realised in the near future. Merchants anticipate that attracting an increased number of off-shore clients in the medium term, while attracting domestic clients might take a bit longer. Off-shore clients are interested in the youth employment focus and achievements of Merchants. Domestic clients are often also involved in their own CSR activities and might take slightly longer to see the differentiating advantage of Merchants.

Improved standing of Merchants in Dimension Data (DiData) CSR Services

With the real value added with this project, Merchants is positioning itself to influence other DiData CSR initiatives. Merchants is not only achieving results for the beneficiaries of its activities and for the business and its employees, but is also taking an important step by measuring the impact and in continuously monitoring its investment and activities. Merchants is making a difference in the environment it functions in: youth development and employment.

4.2.4 Employees of Merchants
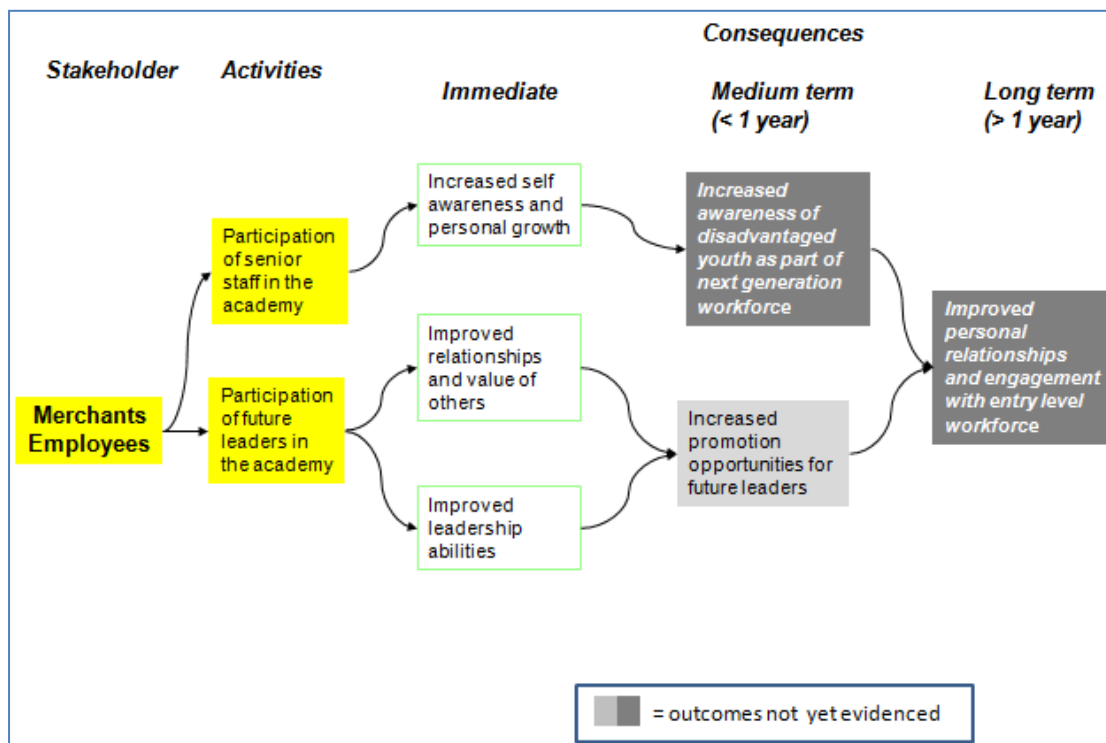
Figure 21 Value Chain for Employees

Staff who attended the leadership academies reported significant changes during and after the academy. These experiences are of similar intensity to those experienced by the attendees from the school.

Immediate Consequences
Increased self-awareness and personal growth

Personal growth was mentioned by most of those who attended the academy. This impact was evident regardless of the time spend at the camp and was even prominent for those who only attended one session.

> "*In my professional life the Columba Leadership experience helped me clarify what I wanted out of my work, I became much clearer of my purpose as an HR practitioner and started to discover new and innovative ways of doing things. I have become much clearer about articulating why and how I work, I truly get the importance of reaching the heart of employees not just their minds.*" (Merchants HR Director)

> "*The personal impact will last for the rest of my life – you can't comprehend how material the sense of achievement is that I have from our involvement in Columba nor the practical impact it has had on me in terms of the value of the simplest things in life – family, time, happiness, etc.*" (Merchants CEO)

> "*I started noticing other examples in life than the bad news around schools. I have hope in life again.*" (Merchants Financial Director)

Improved relationships and value of others

Not only did attendees report personal growth, but also changes in their awareness of others. This includes an awareness of the realities faced by the disadvantaged youth, but also the enormous potential and possible contributions of the youth and other attendees.

> "*I take less for granted and am more convinced than ever that talent, resolve and capability exists throughout society regardless of education, race, colour or religion.*" (Merchants CEO)

> "*An eye opener for me, especially the people factor vs. business factor. Now I can understand my colleagues better.*" (Future Leader)

Improved leadership abilities of Future Leaders

Attending the leadership academy provided an opportunity to the Future Leaders group to develop their leadership skills. Attendees are, effectively, invited to address problems that are very concerning to South Africa at the present moment: that of education and youth employment. The skillset gained from the programme can be extended to numerous situations in the workplace and communities. Thus, this initiative promotes career growth and personal growth amongst employees.

Medium Term Consequences
Increased promotion opportunities for Future Leaders

Although there are many outcomes that might still become visible and measureable in the future, the outcome that seemed most prominent at present for Merchants is related to promotion opportunities for the Future Leaders group. These opportunities were not created by Merchants, but is related to these specific individuals feeling more empowered to take up leadership roles and to practice these and other values instilled during the residential academy as described above.

"At Future Leaders level there is a big influence and people can get promoted in 2 years." (Future Leader)

Increased awareness of disadvantaged youth as part of next generation workforce

It is important for the business that employees become aware of the potential of the youth, especially those from disadvantaged backgrounds. To develop the potential of the future workforce, it would assist corporates to have an understanding of today's youth. This is not evident at present, but increasing numbers of employees will gain insight in the near future.

> "*Business leaders need to know why they should get involved and by that I don't mean that it's a good CSR initiative, rather it is an essential initiative for the future of the next generation of business leaders in South Africa, a generation that without external support will not receive the opportunity from basic education to succeed.*" (Merchants CEO)

> *"I see they have more potential. The learners start at the bottom, but it harness talent for Merchants."* (Future Leader)

Long Term Consequences
Increased awareness of disadvantaged persons and own social responsibility

It is anticipated that most of the employees will become more aware of needy situations and their socially responsibility. Already, few motivated individuals (including past employees and the HR Director) have realized this change.

> "*I am a lot more understanding to others in less fortunate circumstances and a lot more willing to help others where I can.*" (Leader Forum)

> *"I am involved in more projects such as providing homeless with food and clothing."* (Leadership Forum)

> *"I never anticipated the deep personal and professional transformation that I would experience by attending the Academy. Observing young people from the toughest realities exploring values, discovering purpose and passionately committing to transform their lives and their communities made me think carefully about my own commitment to work and to social development. I found myself grappling with how I could make a difference in society with all the resources at my disposal if the young people who had nothing were so committed. I found myself examining areas of excess, my living expenses and material interests - even my personal grocery bill reduced by a third.*" (Merchants HR Director)

4.3 SROI Return Ratios

The SROI result for Merchants is presented in the table below:

Table 9 SROI Return Ratios

Time	Social Value	Investment	Ratio
Impact at present	R 564 680.00	R 748 250	0.83:1

The SROI figures above indicated that the Columba Leadership Academy at Centurion College sponsored by Merchants programme delivers an SROI of 0.83:1. That is, for every R1 invested approximately R0.83 of social value is created.

4.4 Sensitivity analysis of possible future impact

Since many outcomes have not been included in the evaluation SROI, a number of these outcomes were included in a sensitivity analysis to determine possible future return on investment (ROI). The outcomes included for this analysis were described with each Value Chain and include the following:

Table 10 Outcomes included in Sensitivity Analysis - Future

Stakeholder Group	Outcome	Indicator
School	Improved meeting of Learners basic needs	# of learners whose basic needs are met
	Improved standing of school	% improvement in Matric pass rate
	Increased developments of school projects (new library, vegetable garden)	# of new projects initiated since the academy
	Improved Inter-school collaboration	# of bursaries to attend better school
	Increased developments of community projects (OVC outreach)	# of community projects initiated since the academy
Learners	Increase of Alumni involvement in mentorship to school learners	# of learners being mentored by alumni
	Increase of Alumni involvement at the school	# of alumni engaging in motivational speaking exercises
Merchants	Improved retention rates (reduced training of new recruits)	# employees retained for more than x year
	Changes in company strategy similar to BBBEE – showing that Merchants	# of programs influenced (Future leader dev program, Emerging

Stakeholder Group	Outcome	Indicator
	walk the talk in CSR engagement with youth	Talent program)
	Increased engagement of off-shore (international) clients through CSR outcome as differentiator	# of new off-shore client leads since CSR inception
	Increase attraction of domestic clients through CSR outcome as differentiator	# of new domestic client leads since CSR inception
	Improved awareness of Merchants CSR strategy within DD aligned to DD's new focus - education & youth	# of initiatives adopted/incorporated in other DD CSR programs
Employees	Increased awareness of disadvantaged youth as part of next generation workforce	# of employees acting in social responsible manner (e.g. doing community work, mentoring, etc.)

The SROI result for Merchants regarding expected future outcomes is presented in the table below.

Table 11 SROI Result after Sensitivity Analysis

Time	Social Value	Investment	Ratio
Expected future	R 2 331 386.00	R 748 250	4.72:1

4.5 Sensitivity Analysis

The SROI ratio calculated is contingent on several assumptions and it is necessary to test the effect of changing these assumptions on the ratio. In doing so, we challenge the robustness of our assumptions to determine whether we can still be confident that Merchants will create value at Centurion College through Columba Leadership. In addition, this helps understand what the key drivers of value creation are, and how they can be leveraged to create more value.

4.5.1 Conservative Assumptions

A conservative approach to monetizing outcomes has been adopted, while an attempt has been made to retain the different types of outcomes that occur at the different levels. Certain outcomes could not be included as a result of lack of evidence to allow monetising the outcomes. A sensitivity analysis was included to allow predictions of values for future outcomes and to test some of the assumptions made during this analysis.

The first sensitivity analysis tested the robustness of the current analysis regarding the outcomes for the learners. It tested the assumption that the current SROI analysis was conservative regarding the

numbers of learners. The ratio did not change much from 0.83:1 to 0.96:1. The following outcomes were adjusted.

Table 12 Testing the Sensitivity of some of the Conservative Assumptions

Outcome	Indicator	Baseline	Change	Ratio
Increased ability to transition into further education	# of learners who qualify and go on to further education	4	18	
Increased feelings of learners that they want to contribute to others for greater good	# of learners returning to school to donate/contribute to the school	1	5	0.96:1
Improved leadership abilities	# learners who take up leadership roles	10	20	

4.5.2 Deadweight Assumptions
The second sensitivity analysis tested the robustness of the current analysis regarding the deadweight attributed to two of the outcomes. It tested the assumption that the current SROI analysis allocated a high deadweight. The assumptions seem to be accurate as the ratio did not change much from 0.83:1 to 0.95:1.

Table 6 Testing the Sensitivity of Deadweight Assumptions

Outcome	Indicator	Baseline	Change	Ratio
Increased ability to transition into further education	# of learners who qualify and go on to further education	80%	0%	
Increased awareness of CSR outcomes by clients and industry	# of awards and media coverage received	80%	0%	0.95:1

4.5.3 Attribution Assumptions

The third sensitivity analysis tested the robustness of the current analysis regarding the attribution allocated to three of the outcomes. It tested the assumption that the current SROI analysis allocated a low attribution and that some of the outcomes actually could have higher attribution from other sources (although still considered low due to the situation of the school). The assumptions seem to be relatively accurate as the ratio did not decrease much from 0.83:1 to 0.77:1.

Table 14 Testing the Sensitivity of Attribution Assumptions

Outcome	Indicator	Baseline	Change	Ratio
Improved accountability/ responsibility of Educators	# of teaching days that teachers are not absent from school (changes from previous years)	0%	20%	
Improved relationship between Principal, Educators, Learners and Parents	# hours school remains open for study (to allow those learners that do not have space at home to study)	0%	20%	0.77:1
Increased awareness of CSR outcomes by clients and industry	# of awards and media coverage received	0%	20%	

4.5.4 Drop-off Assumptions

The fourth sensitivity analysis tested the robustness of the current analysis regarding the assumptions on drop-off allocated to all the outcomes. It tested the assumption that the current SROI analysis allocated a low drop-off rate and that all the outcomes actually could have higher drop-off rates. The assumptions seem to be relatively accurate as the ratio did not decrease much from 0.83:1 to 0.75:1 even when the drop-off rate was increased to 50% for all the outcomes (from the original 0%).

4.5.5 Duration Assumptions

The fifth sensitivity analysis tested the robustness of the current analysis regarding the duration allocated the outcomes.

It first tested the assumption that the current SROI analysis allocated a long duration and that some of the outcomes actually could have a much shorter duration. The assumptions seem to be relatively accurate as the ratio did not decrease much from 0.83:1 to 0.68:1 when assuming that the duration of all outcomes are only 1 year.

The second tested the assumption that all outcomes had durations of two years. The ratio then changed from 0.83:1 to 0.91.

Changing the duration to three years for all outcomes increased the ratio to 1.11, which is still not a very significant change.

4.6 Verification and Dissemination of Results

The outcomes were verified by Merchants (steering committee) and the school (through the principal and the educator in charge of the group of learners. Other stakeholders were contacted to verify outcomes when the outcomes were finalised.

The financial proxies were verified and additional information provided by the HR manager of Merchants, the administrator and financial manager. The proxies related to the school were verified and additional information provided on actual values by the principal.

The results of this analysis have been shared with key stakeholders in the project, including the school principal and the steering committee from Merchants. These stakeholders were satisfied with the report and a shorter version for use by Merchants in their own communication strategies. They valued the outcomes as part of their ongoing monitoring indicators and activities. Merchants indicated that results of the report will be used to engage with other key partners of the business, including Dimension Data; and existing and potential clients.

Continuous updates and the final report were also shared with the Columba Leadership (SA). The explanation of the theory of change was given which was valuable for this report. Additional feedback was received a year after the report was finalised and mostly focussed on criticisms around the impact of events that happened post the SROI analysis. For example additional business generated for Merchants, increased (claimed 40%) attrition rates of staff, changes in matric pass rates for the school (which could not have been influenced solely by the Columba Academy and happened after the SROI study was completed), leadership development (which is not possible be at the cost indicated by Columba Leadership and no evidence was found or even mention made by any Merchants' leadership of such value generated for mostly four hour engagements at the academy). These objections that have valid marketing implications for Columba Academy and Merchants for the future could not reasonably affect this report. All the parties appreciated the recommendations amde in the report.

5. Recommendations

5.1 Recommendations to Merchants

i.   The results and the report of this analysis can be used in conversations with different stakeholders of Merchants, i.e. clients and investors, to enhance the profile of the company.

ii. The "premature" outcomes and the indicators of those outcomes should be integrated into a monitoring system and be used to calculate the SROI in the future. This includes continuous information collection. The progress of these outcomes can direct future activities and to strengthen the existing system. The specific indicators that should be monitored include:
   - Improvements in retention rates
   - Changes in the company CSR Strategy (similar to those that happened in the BBBEE strategy)

- Increased off-shore and domestic clients through Merchants' CSR activities being regarded as a differentiating factor (showing its caring culture)
- Awareness of Dimention Data regarding Merchants' leading role in CSR
- The number of employees becoming aware of disadvantaged youth as an important part of the future workforce

iii. The results and key findings of this study can assist Merchants to improve employee engagement. It provides insight into aspects that can be improved to enable optimal interaction, for example improved communication between staff levels and business units.

iv. Investigating the possibility of individual mentorship between employees and learners on a continuous basis.

v. The direct influence of attending the residential aspect of the academy has reached the concerned employees, but the influence has not yet permeated all levels or business units of Merchants. However, this can be achieved if relationships with the individual learners are sustained and more employees are encouraged to attend the academy.

5.2 Recommendations to Centurion College

i. Continuing networking and building new partnerships.

ii. Using the Rotary structures and Interact Club to contribute to:
   a. Other projects (e.g. roof-top markets)
   b. Engagement and providing opportunities to link with other learners from (more privileged) schools for the benefit of the school and to inspire and cascade the outreach projects to be included in those schools.

iii. Developing a monitoring and evaluation system that can allow easy and close monitoring of indicators such as improvements in teachers absenteeism, increase in grade marks for academy learners, etc.

iv. Encouraging successful (e.g. employed) alumni to return to schools to motivate learners or become involved in continuous mentoring of learners.

5.3 Recommendations to Columba Leadership

i. Promoting the outcomes that the Columba Academy had directly and indirectly on the funding partners.

ii. Investigating models of continued relationships between schools and business partners post-academy. Systems need to be in place to ensure that there are clear responsibilities for each partner for future engagements.

iii. Investigating and promoting repeat academies at schools. It seems that critical mass for optimal results were achieved after the second (and possibly only the third) academy.

iv. Developing mechanisms to allow "successful" learners to return to schools to motivate learners.

6. Conclusions

The relationship between Centurion College and Merchants provides an important insight into the effect that CSR activities can have on the beneficiary organisation as well as the business through organisational change (changes in corporate culture and employee and client engagement). The significant continued investment and engagement of Merchants with the school had significant effects on both the school and Merchants. This effect will increase if the involvement continues and closer relationships are built between individuals of the two institutions.
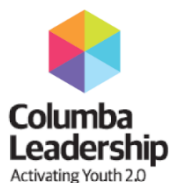
Merchants is able to utilise the SROI analysis to assess the value of and the effectiveness of the Columba Leadership programme with Centurion College. The SROI analysis is able to quantify the effects of realised and expected changes. It is able to identify qualitative outcomes that have already occurred in the past or will occur in the future. Further, the corporate can use the resulting data and recommendations to improve future CSR initiatives.

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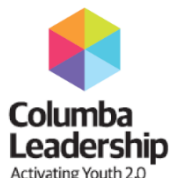
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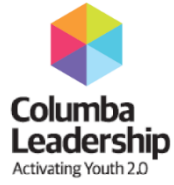
Appendices

Appendix A: Columba Strategy

The Programme at a Glance:

| Baseline Assessment | During Academy | Post Academy: 2-6 weeks; per term (year 1) and bi-annually/per term (year 2) | Final Evaluation 24 months | Tracking |

COMMUNITY ENGAGEMENT & INVESTMENT

Awareness Raising, School Identification & Competitive application

Initial consultations with key stakeholders

Introduction to Columba for potential participants

Orientation session for selected participants

Rejoining our community

Planning workshop

DEVELOPMENT, ACTION & REVIEW

Values Champ Capacity Building

Group and Individual Actions

Reapplication

Annual Connection Event

4 wks
Approximately 3 months
3-5 years

6 days

2 weeks

1 month

Approximately 24 months

Principal Meeting 3 months prior to Residential

SMT workshop 2 months prior to residential

Whole Grade Presentation 1 month prior to residential.

Essay writing and diverse group selection

Educator presentation

RESIDENTIAL ELEMENT

Orientation Participants and Parents & Values Champion

1 week prior to residential

Sharing with & mobilising other significant people

Year Plan

Educator motivation and role clarity

Toolkits

Sustained projects

Individual progress

Sharing, inspiring and networking

Next Academy

Appendix B SROI Principles

This SROI analysis was guided by the following principles:

Principle	Definition	How this manifested in this process
Involve stakeholders	Stakeholders should be involved to inform what is measured, how it is measured and valued	Primary stakeholders were involved in interviews and/or focus groups.
Understand what changes	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	Incorporated into the interview schedule and focus group guide and was assigned the greatest time allocation in these processes.
Value the things that matter	Use financial proxies in order that the value of the outcomes can be recognised	This was used for both tangible and intangible elements.
Only include what is material	Determine what information and evidence must be included in the report to give a true and fair reflection, such that stakeholders can draw reasonable conclusions about impact.	An attempt was made to provide context for understanding the programme and the people involved through background information. Evidence included in the impact map. Interview schedules included.
Do not over claim	Only claim the value that the organisation is responsible for creating	Stakeholders were questioned about other contributors. Filters were applied. A conservative approach to valuing outcomes was used which often translated to the value of services that might have achieved similar outcomes rather than the likely full extent of the social impact.
Be transparent	Demonstrate the basis upon which the analysis may be considered accurate and honest and indicate that it will be reported to and discussed with stakeholders.	Impact map included together with reference to source information.
Verify the results	Ensure appropriate independent verification of the report.	Final report shared with stakeholders for verification. Guidance offered throughout process by independent SROI practitioner.

Appendix C: Stakeholder inclusion decisions

Initial list of potential stakeholders	Description and motivation	Decision	Who/What contributed to the decision
School Principal	The school principal attended academy 2 and 3. She was personally motivated to become a better leader for the school	Major stakeholder who can testify to medium term outcomes at the school	Initial scoping meetings, steering committee meetings, interviews with school principal and other stakeholders (including Columba Leadership)
Educators who attended academies	Two educators attended the academies, both were included in the analysis	Major stakeholder who can testify to medium term outcomes at the school	Initial scoping meetings, steering committee meetings, interviews with school principal, educators, learners, Columba leadership and other stakeholders
Other educators at school	Although it is anticipated that other educators will be influenced by those who attended the academy this effect has not yet rolled-out at the time of the study	Not included as a stakeholder group as there were no material changes yet	School principal and educators interviews
Learners who attended academy 1	This group has mostly left the school and was represented by the three new employees at Merchants, two learners who gained entry to tertiary education and one who had to repeat the year. The six learners represented the 10 learners of academy 1.	Major beneficiary who can testify to medium and long term outcomes for the school and who are likely to experience significant outcomes. The three subgroups represented outcomes in the same results chain and the groups were therefore considered as a single group of learners who attended the academy (the different outcomes were due to the time since the academy and not because the sub-groups differed	School principal, Columba Leadership and interviews with the learners themselves
Learners who attended academy 2	This group was available at the school and was busy with their implementing projects. The 10 learners of academy 2 were represented by three learners.		
Learners who attended academy 3	This group had limited outcomes in the short time since the academy. The sub-group of learners who attended academy 3 was represented by 2 learners.		

Initial list of potential stakeholders	Description and motivation	Decision	Who/What contributed to the decision
Learners who did not attend the academy	Although this group is also considered to be the ultimate beneficiaries through the new programmes and activities started by the learners who attend the academies, this has not yet realised at the time of the SROI.	There were no material changes for the group at the time of the analysis as projects have not yet been rolled out (e.g. library and vegetable garden) **and** learners were not included in activities of the "academy groups" (it should be included in future SROIs when more than three or more academies have a cumulative effect on learners and the academies and/or business sponsor have a longer time to make an impact on the rest of the school)	Focus groups with learners, school principal and educators who attended the academy and discussions with other learners at the school who were mostly not even aware of the Columba Academies
Learners (three) who were employed by Merchants	The one group with a significant different outcome (being employed by Merchants that cannot be generalised to the whole group as this was not part of the academy, but as part of the HR manager relationship with the school) were regarded as a subgroup although their information generally also contributed to the understanding of the larger group of learners.	Major beneficiary who can testify to medium and long term outcomes for the school and Merchants and who are likely to experience significant outcomes	Interviews with school principal and Merchants HR manager
Parents and other family members	It is anticipated that the influence of the academies will have a spill-over effect on the parents. However the parents who were contacted said that although they were proud of their children being selected to attend the academy it did not yet have an influence on their lives as parents or the community at large.	Premature outcomes that were not yet realised at the time of the study.	Past Columba Leadership reports. Interactions with learners and some parents.

Initial list of potential stakeholders	Description and motivation	Decision	Who/What contributed to the decision
Community members	Same as above and further the community projects started by the learners (OVC and vegetable garden) were not yet implemented or able to influence the community yet. Cleaning of the school grounds influenced no more than the school and is included as an outcome on school level.	Premature outcomes that were not yet realised at the time of the study.	No significant influence was reported by parents and the cascading effect on the community was not regarded as evident at the time of the study.
CEO	The CEO attended although stationed in UK.	These sub-groups were grouped together as the outcomes for the groups were the same. Major stakeholder who can testify to medium term outcomes personally as employee at Merchants: called **Merchants ExCo.**	Various discussions with HR manager, steering committee and Columba Leadership CEO.
Executive who attended academy	Different ExCo members attended the academy. Two ExCo members subsequently left Merchants and since it was anticipated that this group had positive and negative outcomes they were classified as a separate group.		
Line managers who attended academy	Staff members were invited to apply to attend academy. Some leaders were then selected to attend.	Major stakeholder who can testify to medium term outcomes personally as employee at Merchants: called **Leadership Forum.**	Various discussions with HR manager, steering committee and Columba Leadership CEO.
Staff who attended academy	Staff members were invited to apply to attend academy. Some employees were then selected from a pool of those who showed potential to become leaders.	Major stakeholder who can testify to medium term outcomes personally as employee at Merchants called: **Future Leaders.**	Various discussions with HR manager, steering committee and Columba Leadership CEO.
ExCo who attended academy and subsequently left Merchants	This group was identified as a separate group and was treated as such.	Major stakeholder who can testify to medium term outcomes personally as previous employees at Merchants.	Various discussions with HR manager, steering committee and Columba Leadership CEO.

Initial list of potential stakeholders	Description and motivation	Decision	Who/What contributed to the decision
Staff who did not attend any academy	It was anticipated that this group might experience spill-over effects of the other staff (especially management) attending academies.	These sub-groups were grouped together as the outcomes for the groups were the same. They were interviewed, but the outcomes were not experienced at the time of the study.	Discussions with staff and informal engagement with staff at different levels (including HR administrator).
Staff who wanted to attend the academy, but could not be accommodated	Initially it was thought that this group might have negative outcomes such as feeling some resentment or positive outcomes due to a spill-over effect. After discussions with some staff who did not attend, it was clear that they had an expectation of attending an academy in the future and was not influenced either negative or positive. There outcomes were the same as the general staff who did not attend (without applying).		
Dimention Data (DD) ExCo and CSR management	Initially it was thought that Dimention Data as the "mother company" will be influenced by the CSR activities of Merchants. This was mentioned to be as positive reward to Merchants and perhaps a roll-out effect to also become involved in sponsoring Columba Academies.	This stakeholder group was excluded as the expected influence was regarded as premature. DD was however regarded as an important audience member for the SROI report. (The influence of the results would probably influence DD more than the activities itself).	Various discussions with HR manager, steering committee and Columba Leadership CEO.
Customers	It was initially proposed by Columba Leadership that the customers (especially new/potential customers) will be more prone to deal with Merchants when they are aware of the CSR activities of Merchants.	Premature as clients are not yet influenced to the extent where they will have outcomes directly related to Columba Leadership Academy activities.	It became clear early on in engagements with Merchants that this is an expectation of a very long term outcome.

Initial list of potential stakeholders	Description and motivation	Decision	Who/What contributed to the decision
Competitors	Similarly to the customers the competitors were anticipated to be influenced by Merchant's CSR activities.	Premature as competitors might not yet be aware of the Columba Leadership Academy activities of Merchants. Some of this was further investigated in the interviews with the ExCo members who left Merchants and started their own similar organisation.	This stakeholder group would probably not be influenced this was, but probably more through Columba Leadership marketing efforts. This was confirmed through discussions with Merchants and the ExCo members who left.
Rotary	Rotary is an NGO who is very active in the school. Their involvement was a direct effect of the learners who attended the academy identifying a need for a partner to implement its projects (library and vegetable garden). Rotary and Columba Academy does not share the same strategies and it was important to investigate the influence of Rotary on the project (even if there was no direct outcome for Rotary itself).	Stakeholder who can testify to medium term outcomes at the school, even if no direct outcome for the organisation itself.	Different opinions of the school (principal, educators and learners), Merchants and Columba Leadership regarding the value of Rotary led to the decision of the consultant to investigate the issue through direct interaction with Rotary.
Columba	Although the Merchant-Centurion College partnership contribute financially to Columba Academy it was not sure of there were other direct outcomes to the organisation outside its influence as implementing organisation. It was felt that investments made by the organisation were paid for by the Merchants financial contribution.	Columba Leadership is the implementing agency and outcomes of the organisation or individuals working for them cannot be contributed to the Merchant-Centurion College partnership or programme. Columba Leadership was however regarded as an important audience member for the SROI report and they were consulted extensively in various stages of the study and scrutinised the final report.	Steering committee meetings and direct engagement with Columba Leadership.

Appendix D Interview and Focus Group Guides
SROI MERCHANTS: Principal and Educators IDI

A. Joining/Setting the Scene

1. Introduce and explain purpose of SROI. Provide opportunity to address questions in this regard.

2. Request permission to tape interview.

B. Confirm Personal Details

School	
Gender	
Current Position	
Position when first became associated with Columba	
Year/s attended Academy	
If no academy attendance, when joined academy group	

C. Clarify Involvement/and investment in Academy

1. How did it happen that you ended up participating in the academy?

2. What made you apply? (if that was the case)

3. What has been your involvement?

4. How much time have you put into the academy group?

5. What would you have previously done with this time?

6. Other than your time what else have you invested in the academy group?

D. Stakeholder Mapping

1. Who are all the people that have an interest/stake in this project (they might have contributed something, they may have supported in some ways, they might also have benefitted in some way)?

2. Explain what each invested in the programme.

3. Unpack how these different groups benefitted.

4. Were there any parties who were impacted upon negatively in terms of this academy? Explain.

E. Changes

1. Has being in this programme had any significant changes on you and your life? If yes, please explain. (Identify the most significant)

2. What can or do you do differently because of your involvement in this programme?

3. To what extent are these changes evident – e.g. frequency, duration etc.?

4. What do you hope these changes will mean for/contribute to your future?

5. Has anything changed professionally for you as a result of this programme?

6. What have these changes meant? How have they contributed to your life/your school?

7. Have there been any negative changes for you as a result of the programme or your achievements as a result of the programme? If yes, explain.

8. What has changed at your school as a result of the academy? (specify frequency, duration etc. and identify most significant change)?

9. How do you believe these changes will impact on the future of the school? (specify)

10. Have there been any negative effects at/for the school as a result of the academy programme? (explain).

11. What does it take to get other educators, learners, and community members involved? (if this has not happened why not?)

12. What are the benefits of getting others involved?

F. Valuing the Outcomes

1. In terms of the different changes identified, what are the values of each of these?

2. Would you be willing to pay for participation in the academy?

G. Key Success Factors

1. What would you say or the most important elements of the programme?

2. What aspects would you say have had the greatest contribution to your own life?

3. What aspects would you say have had the greatest contribution to the school?

4. What was needed to make a success of the programme at your school?

5. What are the barriers or constraints to greater success at your school?

H. Deadweight

1. What would have happened at your school without the Columba Academy?

2. What would have happened anyway for you without the Academy?

3. How long would this state of affairs have remained for you and for your school?

I. Attribution

1. Who or what other programmes have contributed to the success that has been achieved at this school? Probe external or local people, government, other organisations, church groups etc.

2. Allocate a percentage of each party to the different outcomes achieved.

J. Duration/Drop Off
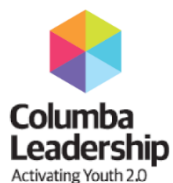
1. How long do you think the changes in your school will remain?

K. Closing

1. Is there anything else about the impact of this academy that you think we should know?

2. Who would you say are the most important stakeholders in the community that we should speak to?

3. We value your input. Might we phone you if we need any other information?

4. Is it ok if we include some of what you have said as quotes in the report? Is there anything you would prefer us not to report on?

5. Would you like a copy of the report?

SROI MERCHANTS: Learners FGD

Anticipated Duration:
2 hours

Groups:
Anticipated two groups from those who attended two different academies

Group size:
8 to 10 learners per group

Resource Requirements:
Stationery requirements: flipchart paper, prestik, marker pens.

Workshop will take place at the school. (Venue arrangements to be made with the school)

1. Introductions and Purpose

This is an important event and we are very happy that you are able to be here. We are interested to find out what is most important and of most value to you as learners who have been part of the Columba Leadership Academies.

This process says we have to listen very carefully to what our stakeholders say. Stakeholders are people who have some interest in the project. You are very important stakeholders and so we have organised a group discussion which will go on for 2 hours.

During this time, we will have a break, so please do try and stay in the room for the whole process. If you need to leave to go to the bathroom please come back as quickly as you can because your thoughts and ideas are very important.

So what will be doing in this workshop?

We are going to start out by building a stakeholder map – that is we are going to identify all the people that you say are part of the leadership academy at your school.

We are then going to talk about what changes this academy brings to the lives of people and their communities or their schools or families. And we are going to try and work out what the value of this is.

But first please can we introduce ourselves. (Facilitator starts with her name and links this with some actions. The group repeats the person's name and the action three times. All in the group are given a chance to do this. Each member of the group is then asked to think of one word that sums up their impression of having been part of the academy group. These words are all captured.)

1. **Stakeholder Mapping:**

Facilitator puts the stakeholder table template up on the board.

The group is asked to identify all the people that are involved in this academy from the beginning of the process. These are all the people who are interested in the project for various reasons, who support it, who participate in it, and even who put money or resources into it.

These are written up and the group identifies all the ways these stakeholders are involved, whether they are beneficiaries/contributors/both.

The stakeholder	Beneficiaries/Contributors/Both	How they are involved

Ensure that the participants themselves and the adults who have offered the most support are included in this list. Confirm whether parents, community members, Merchants (specific people) should be part of this list and get insight into what their contribution has been.

3. Creating the Impact Map and Understanding Learner Investment

Ask the group to think about ALL of the activities that have been part of the academy process at the school. Examples: meetings, presentations, writing proposals, etc.

These are written up on post-it notes/cards and stuck up on the wall in the sequence in which they took place.

They are then asked to think about all the inputs they know about for each of the activities. These inputs are also written up on bright cards and stuck up next to the post-it notes.

Now that we have identified all the activities, let us talk in detail about the contribution/investment of yourselves into this programme (probe for time, duration, frequency and other investments).

How would you usually have used the time and resources you put into this academy group?

The stakeholder	Investment/Contribution	How else resources would have been used

The outputs of the various activities are identified next and also written up and posted on the wall.

Let us talk about what came out of all of these activities and inputs that we have mapped. For example what were the immediate results of being on the academy? Think about how things were for you and this group immediately after the academy.

4. Impact Mapping

Explain to the group that it has been interesting to see all the activities and who is doing what. In this step though we want to know why these activities have been important. Ask the groups to talk briefly in buzz groups of 3 to identify some of the changes they have seen in themselves/ one another/ others or the school because of the academy. These are the changes that might have taken a bit of time to take root.

These are then called out and written up on the wall.

The stakeholder	The changes	Why significant (what these changes enable – what can be done now that could not be done before)

The group is asked to explain why they think these changes are important. What do they hope these changes will result in for them in their lives, the functioning of their school and their homes and community?

E.g. if the group says participation in the academy makes people more confident, the facilitator probes with "who becomes more confident", "how do we know that it makes them more confident", "what can they do since the academy that they could not do before" "how is the academy helping to make them more confident" and "how does it help you if you are confident?" and continues to probe till some longer term outcome is identified.

If you had to vote for the MOST SIGNIFICANT CHANGE, which would get your vote and why?

The group is also asked to identify what are some of the barriers or things that can get in the way of these changes happening. These can be called "Lightning Bolts" things that are dangerous to the outcomes being achieved. These are also written up with the lightning bolt sign next to them. Learners can be asked to stick these up on the wall to ensure some activity to keep energy levels up.

5. Drawing the Impact Map and Identifying Key Success Factors

The information already gathered has been stuck up on the wall in sequence (input-outputs-outcomes-impact).

The facilitator now sticks up the accompanying cards above each group of post-its and explains that we now have an impact map. The group is given a chance to say if they agree with the map. Changes are made if necessary.

Let us put a star next to the elements here (whether they are people, or activities, or resources) that you think have been the biggest contributors to the success of this academy at your school.

6. Attribution and Deadweight

Ask the learners to think about all the other projects or processes happening at their school or their community that they are involved in that may also be helping to achieve the outcomes – could be church programmes, sporting activities, mentoring, the support from educators, government projects etc.

Write these up and stick close to the relevant outcomes.

Ask participants to direct you to put up %pie charts (which have been pre-developed 100%, 50%, 75% etc.) to explain how important the other projects are in producing the outcomes noted. Ask them to explain why these projects contribute to the outcomes.

Also ask participants to share which of these outcomes they think could have come from the other projects alone if the academies did not exist.

7. Valuing the Outcomes

The facilitator takes down the outcomes identified earlier and why these were valued and put these into another table as specified below:

Outcome	Why this change is important	How could we measure this?	What is this worth in Rands

Probe to identify how the changes have enriched learners/families/the schools (gains) or how they have saved money?

In terms of Rands ask young people to give amounts what cellphones, cars, clothes etc are worth to them and get them to compare the value of these outcomes relevant to these actual commodities to try and get a financial amount.

SROI MERCHANTS: Employed Learners FGD

Anticipated Duration:
1 hour

Groups:
Anticipated one group of those who are employed by Merchants

Group size:
3 employees

Workshop will take place at the call centre. (Venue and time from work to be arranged with Merchants.)

1. Introductions and Purpose

This is an important event and we are very happy that you are able to be here. We are interested to find out what is most important and of most value to you as learners who have been part of the Columba Leadership Academies.

This process says we have to listen very carefully to what our stakeholders say. Stakeholders are people who have some interest in the project. You are very important stakeholders and so we have organised a group discussion which will go on for 1 hour.

We are then going to talk about what changes this academy brings to the lives of people and their communities or their schools, business partners (Merchants) or families. And we are going to try and work out what the value of this is.

But first please can we introduce ourselves.

A. Clarify Involvement/and investment in Academy

1. How did it happen that you ended up participating in the academy?

2. What has been your involvement?

3. How much time have you put into the academy group?

4. What would you have previously done with this time?

5. Other than your time what else have you invested in the academy group?

B. Stakeholder Mapping

1. Who are all the people that have an interest/stake in this project (they might have contributed something, they may have supported in some ways, they might also have benefitted in some way)?

2. Explain what each invested in the programme.

3. Unpack how these different groups benefitted.

4. Were there any parties who were impacted upon negatively in terms of this academy? Explain.

The stakeholder	Beneficiaries/Contributors/Both	How they are involved/What they benefitted and/or contributed

C. Changes

OWN LIFE

1. Has being in this programme had any significant changes **on you and your life**? If yes, please explain.

2. What can or do you do differently because of your involvement in this programme?

3. To what extent are these changes evident – e.g. frequency, duration etc.?

4. What do you hope these changes will mean for/contribute to your future?

6. What have these changes meant? How have they contributed to your life/your school/Merchants?

7. Have there been any negative changes for you as a result of the programme or your achievements as a result of the programme? If yes, explain.

SCHOOL

8. What has changed at your old **school** as a result of the academy? (specify frequency, duration etc and identify most significant change)?

9. How do you believe these changes will impact on the future of the school? (specify)

10. Have there been any negative effects at/for the school as a result of the academy programme? (explain).

MERCHANTS

11. Do you think anything changed at **Merchants** as a result of the academy? (specify frequency, duration etc and identify most significant change)?

12. How do you believe these changes will impact on the future of Merchants? (specify)

13. Have there been any negative effects at/for Merchants as a result of the academy programme? (explain).

D. Valuing the Outcomes

1. In terms of the different changes identified, what are the values of each of these?

For

Yourself

Centurion College

Merchants

E. Deadweight

1. What would have happened anyway **for you** without the Academy?

2. What would have happened at **Centurion College** without the Columba Academy?

3. What would have happened at **Merchants** without the Academy?

F. Attribution

1. Who or what other programmes have contributed to the success that has been achieved at this school? Probe external or local people, government, other organisations, church groups etc.

Centurion College and Merchants

2. Allocate a percentage of each parties to the different outcomes achieved.

G. Duration/Drop Off

1. How long do you think the changes in your school will remain?

2. How long do you think the changes for other learners at the school will remain?

3. How long do you think the changes for you will remain?

4. How long do you think the changes will remain for Merchants?

H. Closing

1. Is there anything else about the impact of this academy that you think we should know?

2. We value your input. Might we phone you if we need any other information?

3. Is it ok if we include some of what you have said as quotes in the report? Is there anything you would prefer us not to report on?
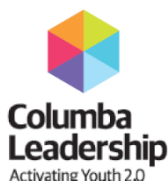
SROI MERCHANTS: Rotary

A. Joining/Setting the Scene

Dear participant, I am [XXXX], a researcher doing a study for Merchants to determine the value of the company's involvement in the Columba Leadership Academies. Merchants need to measure the impact, and quantify the return on investment.

Please note that your name is only used to tract responses by the researcher. No information will be shared with Merchants or any other person/organisation in a way that can identify you. Please be as honest in your answers as this will help us determine the value of the Columba academy.

Please complete the following questions and return by e-mail to [XXXX] or fax to [XXXX].

Please feel free to contact [XXXX] or [XXXX] or the above e-mail if you have any queries.

Thank you for your valuable input.

B. Confirm Personal Details

Name	
Organisation	
Years involved with Centurion School	

C. Clarify Involvement/and investment in Academy   INPUTS

1. What do you know about the Columba Academies at Centurion College?

2. Have you been involved in or witnessed any activities of the academy at the school?

3. What was your involvement with the school :
   - Before the Columba Leadership Academy in 2011?

   - After the academy in 2011?

4. What was your contribution to the school directly relevant to the academy? (This could include time, financial, other?)

D. Stakeholder Mapping

1. Besides the School or Merchants, are you aware of other people who have either contributed or benefitted from the academy or the academy group?

2. What investment/contribution was made by the various stakeholders?

E. Changes	OUTCOMES

1. What was the most important thing that you gained from the school due to the academy?

2. Were there any significant changes to your life due to your involvement in the school (those aspects that changed due to Columba and Merchants)?

Yes		No	

If yes:
- What are they?

3. Have there been any negative effects of being part of the school after the academies for you?

Yes		No	

If yes:
- What are they?

4. What do you do differently now?

5. What do you think changed for learners due to participating in the leadership academy?

F. Valuing the Outcomes	INDICATORS

1. How could this change be measured? (In other words: How do you know that there was a change?)

2. How much of this change would you say occurred?

3. How long will this change last? (Probe for each of the outcomes mentioned)
- Why?

G. Deadweight

1. What do you think would have happened if the school was **not** involved in the Columba academies?

H. Attribution

1. What else (persons or organisations) contributed to:
   - The academy?

   - Changes at the school after the academy?

   - Changes at Merchants after the academy?

   - Changes to your life (personal, work and community involvement)?

2. What types of support have each provided? (Please also allocate a percentage of each party to the different outcomes achieved.)

%

%

%

%

%

I. Duration/Drop Off

1. How long do you think the changes will last?
   - At the school
   - At Merchants
   - For you

J. Closing

Is there anything else about the impact of this academy that you think we should know?

We value your input. Might we phone you if we need any other information?

Is it ok if we include some of what you have said as quotes in the report?

Is there anything you would prefer us not to report on?

SROI MERCHANTS: HR Manager

A. Joining/Setting the Scene

1. Introduce and explain purpose of SROI. Provide opportunity to address questions in this regard.
2. Request permission to tape interview.

B. Confirm Personal Details

Name	
Gender	
Level of leadership	Exco

C. Clarify Involvement/and investment in Academy	INPUTS

You are very involved with the Columba academy and with Centurion College (before and after the academy). You are very involved not only form Merchants, but also on a personal level.
1. What makes you so passionate about this specific CSR activity? How many other people share your enthusiasm?
2. How much was Merchant's contribution to the academies (for Centurion College)? Per academy?

D. Changes and valuing outcomes	OUTCOMES

1. Were there any significant changes due to Merchants involvement in the leadership academy?
- Your personal life
    - o Your involvement in the community (and involvement in social development)
- Your work life
- For Merchants – probe:
    - o Culture:
        - Communication between staff:
        - Agents and teams,
        - Other levels,
        - Senior management
        - ExCo
    - o Staff recruitment
        - How did they involvement with Centurion College influence this?
            - Only 3 new employees or possibly more?
            - Other interest shown by learners?
            - What about recruiting from other sources (direct not through agency?)
    - o Staff training
        - Will it have a significant influence? How and how much will be saved?
        - You or Lynn mentioned that some values (e.g. integrity) is important and that Merchants would prefer to employ persons who they know live the values? Does this have a Rand value to Merchants?
    - o Staff retention
        - Were there any changes in retention yet? What about future expectations?
    - o Staff promotion
        - Any Future Leaders promoted
        - What is it worth, money value?
    - o Changes in CSR policies or strategy
        - Can it be quantified?

- What is this worth?
    - Did the Academies influence other CSR investments in any way? How, what do differently?
    - Engagement with clients
    - How many staff members are acting socially more responsible?
2. We are aware that you are involved in mentoring a learner/new employee.
    - Are there others that you are mentoring?
    - Are other people mentoring any learners/new employees?
3. Merchants and you personally have won some very significant rewards. Congratulations.
    - How is this linked to the Columba Academy CSR work? (at present and in future)
    - How much do you think this can contribute in rand values to the business?
4. Have there been any negative effects due to Merchants participating in the academy?

E. Deadweight

1. What would have happened if you were not involved in the Columba academy?

2. What would have happened if **Merchants** did not participate in the Columba academy?
    - Probe for other CSR activities? (Are staff more aware of other CSR activities or the link between them)

F. Attribution

1. What else (persons or organisations) contributed to:
    - Changes at Merchants after the academy?
2. What have each provided?
3. Allocate a percentage of each party to the different outcomes achieved.

G. Duration/Drop Off

1. How long do you think the changes will last?
    - At the school
    - At Merchants

H. Closing

Is there anything else about the impact of this academy that you think we should know? Is it ok if we include some of what you have said as quotes in the report? Is there anything you would prefer us not to report on?

SROI MERCHANTS: Academy Attendants IDI (Face-to-face or telephonic)

1. Introduce and explain purpose of SROI. Provide opportunity to address questions in this regard.

2. Request permission to tape interview.

B. Confirm Personal Details

Name		
Gender		
Level of leadership	Exco	
	Leadership Forum	
	Future leaders	

C. Clarify Involvement/and investment in Academy   **INPUTS**

1. What made you apply for the academy?

2. What was your involvement with the academy/ school ?
   - What was your involvement after the academy?

3. What was your contribution to the academy?
   - Probe: time, financial, other?

D. Stakeholder Mapping

NB! DO NOT SPEND TOO MUCH TIME ON THIS (Leave till last if time allows)

1. Besides the School or Merchants, are you aware of other people who have either contributed or benefitted from the academy or the academy group?

2. What investment/contribution was made by the various stakeholders?

E. Changes   **OUTCOMES**

1. What was the most important thing that you gained from the academy?

2. Were there any significant changes to your life due to your attending the academy?

If yes:

   - What are they? (prompt for detailed stories)
   - What changes occurred that can be attributed to the academy for each of the following:
     - Personal life
     - Work life
     - Community (and involvement in social development)
     - The school (Centurion)
     - Unemployed youth
     - Merchants – probe re engagement with clients

3. Have there been any negative effects of being part of the academy group for you (the school/Merchants)?

4. What do you do differently now?

5. Do you think that Merchants' involvement in Columba academy (specific employees attending the academy) influence any person's decision to not leave Merchants? How?

F. Valuing the Outcomes   INDICATORS

DO NOT USE TOOMUCH TIME IF RESPONDENT DOES NOT KNOW

1. How could this change be measured? (How do you know that there was a change?)
   - Probe for each of the outcomes mentioned

2. How much of this change would you say occurred?
   - Probe for each of the outcomes mentioned

3. How long will this change last? (Probe for each of the outcomes mentioned
   - Why?

G. Deadweight

1. What would have happened if you did not take part in the Columba academy?

2. What would have happened at Merchants if they did not participate in the Columba academy?

H. Attribution

1. What else (persons or organisations) contributed to:
   - The academy?
   - Changes at the school after the academy?
   - Changes at Merchants after the academy?
   - Changes to your life (personal, work and community involvement)?

2. What sort of support have each provided?

3. Allocate a percentage of each party to the different outcomes achieved.

I. Duration/Drop Off

1. How long do you think the changes will last?
   - At the school
   - At Merchants
   - For you

J. Closing

Is there anything else about the impact of this academy that you think we should know?

We value your input. Might we phone you if we need any other information?

Is it ok if we include some of what you have said as quotes in the report? Is there anything you would prefer us not to report on?

SROI MERCHANTS: Academy Attendants who left: IDI (Face-to-face)

A. Joining/Setting the Scene

1. Introduce and explain purpose of SROI. Provide opportunity to address questions.

2. Request permission to tape interview.

B. Confirm Personal Details

Name		Craig Gibson and Evan Jones	
Gender		2 M	
Level of leadership	Exco		Both

C. Clarify Involvement/and investment in Academy	INPUTS

1. What made you apply for the academy?

2. What was your involvement with the academy/ school ?
   - What was your involvement after the academy?

3. What was your contribution to the academy?
   - Probe: time, financial, other?

D. Changes	OUTCOMES

1. What was the most important thing that you gained from the academy?

2. Were there any significant changes to your life due to your attending the academy?

If yes:
   - What are they? (prompt for detailed stories)
   - What changes occurred that can be attributed to the academy for each of the following:
     - Personal life
     - Work life
     - Community (and involvement in social development)
     - The school (Centurion)
     - Merchants –
       - Internally – probe re ExCo conversations
       - Externally - probe re engagement with clients, Image, etc.

3. Have there been any negative effects of being part of the academy group for:
   - You?
   - Merchants?

4. What do you do differently now?

5. Did attending the academy influence your decision to leave Merchants? How?

6. How did the academy influence you in your new venture after Merchants?

DO NOT USE TOO MUCH TIME IF RESPONDENT DOES NOT KNOW

1. How could this change be measured? (How do you know that there was a change?)
   - Probe for each of the outcomes mentioned

2. How much of this change would you say occurred?
   - Probe for each of the outcomes mentioned

3. How long will this change last? (Probe for each of the outcomes mentioned
   - Why?

F. Deadweight

1. What would have happened if you did not take part in the Columba academy?

2. What would have happened at Merchants if they did not participate in the Columba academy?

G. Attribution

1. What else (persons or organisations) contributed to:
   - The academy?
   - Changes at the school after the academy?
   - Changes at Merchants after the academy?
   - Changes to your life (personal, work and community involvement)?

2. What sort of support have each provided?

3. Allocate a percentage of each party to the different outcomes achieved.

H. Duration/Drop Off

1. How long do you think the changes will last?
   - At the school
   - At Merchants
   - For you

I. Closing

Is there anything else about the impact of this academy that you think we should know?
We value your input. Might we phone you if we need any other information?
Is it ok if we include some of what you have said as quotes in the report? Is there anything you would prefer us not to report on?
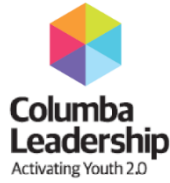
SROI MERCHANTS: Staff non-attendants Electronic survey

A. Personal Details

Name	
Job title	
Years employed by Merchants	

B. Involvement and investment in Academy

1. What have you been told about the Columba Leadership Academy?

_____
_____
_____
_____

2. Have you been involved in or witnessed any of the activities of the academy? Please elaborate.

_____
_____
_____
_____

3. Did you contribute to the activities of the Academy in any way? Please specify any time, financial, other contributions?

_____
_____
_____
_____

C. Changes

1. What was the most important change that happened at Merchants that you think was due to Merchants involvement with the Columba Leadership Academy?

_____
_____
_____
_____

2. Were there any changes to you specifically? Please consider any effects that could have occurred after some employees attended the academy.

Yes		No	

If yes:

- Please describe the changes

_____
_____
_____
_____
_____

3. What changes occurred that can be attributed to the academy for each of the following:

Personal life	
Work life	
Merchants	
Clients of Merchants	
Employees of Merchants	
Community	

4. Have there been any negative effects of Merchants being part of the academy group?

_____
_____
_____
_____

5. What do you do differently now?

_____
_____
_____
_____

D. Valuing the Outcomes

1. How could this change be measured? (How do you know that there was a change?)

_____
_____
_____
_____

2. How much of this change would you say occurred?

_____
_____
_____
_____
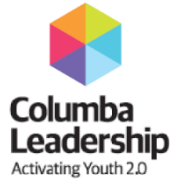
3. How long will this change last?

_____
_____
_____
_____

E. Deadweight

1. What would have happened if Merchants did not take part in the Columba academy?

_____
_____
_____
_____

F. Attribution

1. What else (persons or organisations) contributed to:

- Changes at Merchants after the academy? Allocate a percentage to each party (person or organisation).

  _____%_____
  _____%_____
  _____%_____
  _____%_____
  _____%_____
  _____%_____
  _____%_____
  _____%_____

- Changes to your life (personal, work and community involvement)? Allocate a percentage of each party.

  _____%_____
  _____%_____
  _____%_____
  _____%_____
  _____%_____
  _____%_____
  _____%_____
  _____%_____

2. What sort of support have each provided?

_____
_____
_____
_____

1. How long do you think the changes will last?

	Years
At Merchants	
For you	
Others (specify)	

H. Closing

Is there anything else about the impact of this academy that you think we should know?

_____
_____
_____
_____

Appendix E: Stakeholder Impact Map

Stakeholders	Intended/unintended changes	Inputs		Outputs	The Outcomes (what changes)								Dead weight %	Displacement %	Attribution %	Drop off %	Impact
					Description	Indicator	Source	Quantity	Duration	Financial Proxy	Value R	Source					
Who will we have an effect on? Who will have an effect on us?	What do we think will change for them?	What will they invest?	Value R	Summary of activity in numbers	How would we describe the change?	How would we measure it?	Where did we get the information from?	How much change will there be?	How long will it last?	What proxy did we use to value the change?	What is the value of the change?	Where did we get the information from?	What would have happened without the activity?	What activity would we displace?	Who else would contribute to the change?	Will the outcome drop off in future years?	Quantity times financial proxy, less deadweight, displacement and attribution
School	●To improve relationships (better understanding of learners circumstances and backgrounds by Principal and educators) ●To improve learners matric results	●Time (Principal to recruit learners, convince parents and Board members) - 1 week per year ●Time to	R 51 750.00	●1 Principal attended academy ●3 Educators attended academy ●New open door policy of Principal ●Changes	Increased networking with local businesses	# of businesses actively engaged with the school since the start of the academy	Stakeholder Interview - Principal	1	2	Cost of putting on school activities	R 30 000.00	Estate agent/Local transport company	0%	0%	0%	0%	R 30 000.00
					Improved accountability/responsibility of Educators	# of teaching days that teachers are	Stakeholder Interview -	15	2	Teacher salary	R 634.00	Pay scale (updated 17	0%	0%	0%	0%	R 9 510.00

Category	Objectives	Inputs		Outputs	Outcomes	Indicator	Source			Proxy	Value	Value Source					Total
	●To improve team work ●To improve local community involvement with school ●To improve teaching skills when identifying and using learner leaders	attend academy - 5 days (Principal once) ●Time of Principal to attend Learner group meetings or get feedback - 1 hour per week ●Time (Educators attend academy) - 5 days ●Time to assist learners with programs (Educators)		in attitude towards learners ●Improved Networking skills		not absent from school (changes from previous years)	Educators					March 2013)					
					Improved relationship between Principal, Educators, Learners and Parents	# hours school remains open for study (to allow those learners that do not have space at home to study)	Stakeholder Interview - Principal	1800	2	Hourly salary of a teacher	R 87.00	Estimation	35%	0%	0%	0%	R 101 790.00
Learners	●To develop partnerships and networking skills ●To improve relationships (with parents, educators and in general) ●To learn and implement values (including valuing other people)	●Time ●Attention ●Knowledge and wisdom		●36 attended academy in 2 years (Gr 1-12, Gr 2-12, Gr 3-12) ●Formed group at school: Total 63 learners ●Started Library (painted	Increased access to workplace and understanding of requirements for employment in formal sector	# of learners employed after Matric	FGD	3	2	Salary of new employees	R 78 000.00	Merchants	0%	0%	40%	0%	R 140 400.00
					Increased ability to transition into further education	# of learners who qualify and go on to further education	Stakeholder interview - Principal	4	1	Cost of degree course (1st year)	R 31 000.00	Online WITS	80%	0%	40%	0%	R 14 880.00
					Increased feelings of learners that they want to contribute to others for greater	# of learners returning to school to donate/contr	Stakeholder interview -	1	1	Uniform and books (used)	R 1 000.00	The Citizen newspaper	0%	0%	40%	0%	R 600.00

	Objectives	Inputs	Budget	Activities	Outcome	Indicator	Method	Target	Actual	Proxy	Amount	Source	%	%	%	%	Total
	●To leave a legacy at the school and the direct environment of the school			walls, new carpet, shelves, books) To be completed March 2013 ●Outreach project to Children's home (not yet functional) ●Started Roof Garden project (not yet functional) ●ALEC (Environmental campaign) to clean environment - Adhoc	good	ibute to the school	Principal										
					Improved leadership abilities	# learners who take up leadership roles	FGD	10	1	Rate of assisting with homework	R 5 720.00	UJ student, gumtree	0%	0%	0%	0%	R 57 200.00
Merchants	●To have a pool of possible future recruits ●To harness talent for Merchants ●To contribute to learners understanding of the workplace and to prepare for future (assist e.g. with CV development) ●To change the culture of the	●Money (sponsorship of 5 academies - 3 at Centurion) ●Time of senior staff (varies from 1 to 5 days - most did not attend full	R 696 500.00	●28 Leadership Forum members attended	Increased direct recruitment of new employees who already showed values like integrity	# of possible recruits in pool from Academies	FGD and Interviews	3	2	Cost of recruiting a person through current route	R 8 500.00	Merchants	0%	0%	0%	0%	R 25 500.00
					Increased awareness of CSR outcomes by clients and industry	# of awards and media coverage received	FGD and interview with key informant	3	2	Use advertising value half page in a similar magazine	R 24 000.00	Advertising value of similar publication	60%	0%	0%	0%	R 28 800.00

	company ●To change the image of the company to a caring organization	camp)														
Employees	●To provide leadership skills that will enhance promotion ●To enhance interpersonal relationships	●Time of employees (most attended 6/7 days) ●Time of those personally involved (some stayed in touch and attended events with participants) ●Financial contribution of some individual staff members	●15 Future leaders attended ●Insight into self and relationship with others	Increased promotion opportunities for Future Leaders	# of promotions of future leaders due to improved leadership (and living the values)	FGD and Interviews	3	1	Change in salary	R 52 000.00	Merchants	0%	0%	0%	0%	R 156 000.00
Total		R 748 250.00														R 564 680.00

Appendix F: Outcomes decisions

Group	Outcome	Outcome timing in results chain	Indicator	Included in SROI index	Motivation and evidence
School	Improved relationship between Principal, Educators, Learners and Parents	Immediate Outcome	# hours school remains open for study (to offer learners an environment that is conducive to studying)	Yes	After the principal attended the 2nd academy she changed. She reported being more open to other opinions and she now has an open door policy (examples mentioned of parents who are now approached differently). This was verified by others (Educators, Learners and Columba staff) who also commented on her new attitude and behaviour. The stated indicator was mentioned specifically by the learners as an indication of this change.
	Improved accountability/responsibility of Educators	Immediate Outcome	# of teaching days that teachers are not absent from school (changes from previous years)	Yes	The principal, educators and learners commented that the educators who attended the academies act more responsible. This was most prominent in the number of teaching days that they are now at school (and not absent).
	Improved patience and understanding of Learners' circumstances and differences	Immediate Outcome	# of reported relationship improvements	No	Although this was mentioned as the next step, most interviewees (learners and educators) agreed that this has not yet realised.
	Increased networking with local businesses	Medium term Outcome	# of businesses actively engaged with the school since the start of the academy	Yes	The principal and Columba Leadership staff mentioned that the principal's ability to network with local business improved as part of her new leadership skills. This led to local business in-kind sponsorship for the school by providing space for school activities (much valued as this is an inner city school).

Group	Outcome	Outcome timing in results chain	Indicator	Included in SROI index	Motivation and evidence
	Improved performance of Learners	Medium term Outcome	% average grade marks improved	No	It is expected that the average grades of the learners will increase; this however means that most of the learners will have been influenced by the group who attended the academies. This was not possible in the one year since the project was implemented as evident from the school reports at the time and mentioned by the principal.
	Improved standing of school in neighbourhood	Potential future outcome	% improvement in Matric pass rate	No	Following on the outcome above it is anticipated that the school standing will improve, most probably indicated by learners performing better in the matric national exam. This was not yet realised for the learners of the 1st academy (the one group that already wrote the exam at the time of the study). One learner who attended the academy actually failed the exam.
	Development of school projects: new library and garden	Potential future outcome	# of new projects initiated since the academy	No	There was evidence of the new projects being started. However none of the project had any outcomes yet as the library is not yet functional and the vegetable garden is only being planned. This was evident from interviews with learners, educators and Rotary. Observations (photos) also verified this.
	Improved inter-school collaboration	Potential future outcome	# of new collaborations initiated since the academy	No	The learners who were part of the 1st academy expressed strong views that the combined effect of the principal, educator changes and the learner involvement combined with networking opportunities through the Merchants partnership will in the future lead to improved collaboration between schools. This was not yet initiated.

Group	Outcome	Outcome timing in results chain	Indicator	Included in SROI index	Motivation and evidence
	Development of community projects: OVC outreach	Potential future outcome	# of community projects initiated since the academy	No	Another project that specifically involves community outcomes was in the initial phases of being implemented. The interactions were not yet showing any outcomes as mentioned by the educator in charge of the project and the Rotary member interviewed.
Learners	Increased self-awareness and self-esteem	Immediate Outcome	*This becomes part of the story of change as this happens early on in the value chain creation*		It was clear from the interactions with learners that their self-awareness and self-esteem increased during and directly after the academy. This is a direct output and was a result that the other outcomes were build upon. Double counting would result if this increase was included in calculations.
	Improved leadership abilities	Immediate Outcome	# learners who take up leadership roles	Yes	The principal, educators and peers all commented that the learners who attended the academy became more aware of their leadership abilities and took up more leadership roles. This was included (incorporating the previous outcome).
	Increased ability to transition into further education	Immediate Outcome	# of learners who qualify and go on to further education	Yes	Two learners were able to transit into further education by being registered at Universities. The learners mentioned this and the consultant subsequently interviewed the individuals. They both commented that this was not exclusively due to attending the academy and that would probably have applied regardless. However, the outcome was included as both mentioned that the programme did play a role.
	Increased feelings of learners that they want to contribute to others for greater good	Immediate Outcome	# of learners returning to school to donate/contribute to the school	Yes	One of the learners attending the university and all three employed at Merchants indicated that they feel more responsible to contribute to others. Two of these contributed to the school as a beneficiary.

Group	Outcome	Outcome timing in results chain	Indicator	Included in SROI index	Motivation and evidence
	Improved relationships and value of others	Immediate Outcome	*This becomes part of the story of change as this happens early on in the value chain creation*		The other outcomes for the learners were build on this early result. After improved value of themselves, the learners also valued others more and managed relationships better. The value of this is captured in the later outcomes, including doing things for others for greater good.
	Increased access to workplace and understanding of requirements for employment in formal sector	Immediate Outcome	# of learners from the Academy employed after Matric	Yes	Three learners were employed by Merchants. They mentioned that the continued interaction of the school with the HR manager of Merchants enabled this to happen. They applied, and were successful as they had a better understanding of the workplace.
	Improved ability to network (in problem solving)	Potential future outcome	*# of reported incidences of better problem solving*	No	The learners employed by Merchants mentioned that they expected that they will be able to improve their networking skills in the near future. Expected outcome not yet achieved.
	Improved networking with other learners from "more privileged" schools, influencing those learners to contribute to community	Potential future outcome	*# of new relationships formed with other learners from "more privileged" schools*	No	The learners employed by Merchants mentioned that they believe that the learners who attend the academy with the assistance of Merchants will be able to network with other schools (especially private "rich" schools) in the future.
	Improved networking with other learners from "more privileged" schools, influencing those learners to contribute to community	Potential future outcome	*# of learners from more privileged schools becoming involved in community*	No	As the next result after the improved networking, learners also felt that in future they would be able through example influence learners from the "more privileged" schools to also contribute more to community projects. This expected outcome was not yet achieved

Group	Outcome	Outcome timing in results chain	Indicator	Included in SROI index	Motivation and evidence
	Increase of Alumni involvement in community projects/mentorship to school learners	Potential future outcome	*# of alumni engaging in community projects*	No	The learners, educators and school principal (and Columba Leadership) felt that ultimately the school alumni will make contributions to their own communities. This will however only take place after the intervention has been implemented for a while (most probably about 4 to 5 years).
Merchants	Increased communication of CSR outcomes	Medium term Outcome	*This becomes part of the story of change as this happens early on in the value chain creation*		There were contradictory reports whether there was increased communication of CSR activities at Merchants. Most staff members who did not attend any of the academies were not aware of the programme. The management and Columba Leadership were very adamant that this would lead to other outcomes such as marketing opportunities as staff will talk to clients about the CSR activities that will make Merchants appear more caring and therefore attractive to use as service provider. Even if this was evident it can be regarded as an early result that other outcomes such as client awareness are based upon.
	Strengthening of relationship between business and school	Medium term Outcome	*This becomes part of the story of change as this happens early on in the value chain creation*		It was an expectation that there will be stronger relationship between the school and Merchants. However, from interactions with the school and staff members of Merchants it seemed that interactions were discouraged by Columba at that stage (except through the HR manager). Most other outcomes would be based on this outcome and it was decided not to include it in the analysis.

Group	Outcome	Outcome timing in results chain	Indicator	Included in SROI index	Motivation and evidence
	Increased direct recruitment of new employees who already showed values like integrity	Medium term Outcome	# of possible recruits in pool from Academies	Yes	The new recruits form the school was mentioned, by stakeholders of both the school and Merchants, as a highlight and was valued as an outcome.
	Increased awareness of CSR outcomes by clients and industry	Medium term Outcome	# of awards and media coverage received	Yes	It was evident from the awards observed by the consultant and mentioned by the HR manager and other ExCo members that the CSR activities are being recognised by the industry.
	Improved retention rates (reduced training of new recruits)	Potential future outcome	# employees retained for more than x year	No	Although Columba Leadership and some members of the steering committee indicated that the awareness of the CSR activities and changes in the organisational culture will lead to improved retention rates for Merchants. There was however no evidence of this expected outcome being achieved.
	Change in culture of organization	Potential future outcome	# of reported observations of a change in culture	No	There were expectations of changes in the organisational culture expressed by Merchants steering committee and Columba Leadership. Although this seems to be a reasonable long term expectation it was not evident at the time of the study.
	Changes in company strategy similar to BBBEE – an indication of Merchants' integrity in its CSR engagements	Potential future outcome	# changes in policies and strategies related to employment and youth opportunities	No	This outcome is also a reasonable next step in the results chain. However, there were no changes made to any policies or company strategies.

Group	Outcome	Outcome timing in results chain	Indicator	Included in SROI index	Motivation and evidence
	Increase attraction of off-shore (international) clients through CSR outcome as differentiator	Potential future outcome	# of new off-shore client leads since CSR inception	No	This long term expected outcome as expressed by the Merchants ExCo (including the members who left the company) and Columba Leadership was not yet achieved and not evidence were found for any new international or local clients.
	Increase attraction of domestic clients through CSR outcome as differentiator	Potential future outcome	# of new domestic client leads since CSR inception	No	This long term expected outcome as expressed by the Merchants ExCo (including the members who left the company) and Columba Leadership was not yet achieved and not evidence were found for any new international or local clients.
	Changes in interaction and communication between different staff levels	Potential future outcome	*# of reported changes in interaction*	No	Initially the steering committee at Merchants and the ExCo members were convinced that the communication between management and other staff members improved. This expected outcome was not yet achieved. The interviews with other staff indicated that the communication will probably improve, but that it will happen as a upward strategy rather than a top-down.
	Improved standing of Merchants in Dimension Data CSR	Potential future outcome	*# of initiatives adopted/incorporated in other Dimension Data CSR programs*	No	There is an expectation that Merchant's standing in the Dimention Data group of companies will improve due to the CSR activities. This was mentioned by Merchants as a very long term expected outcome and all agreed that it will not be achieved in the near future.

Group	Outcome	Outcome timing in results chain	Indicator	Included in SROI index	Motivation and evidence
Employees	Increased self-awareness and personal growth of Leadership forum members	Immediate Outcome	*This becomes part of the story of change as this happens early on in the value chain creation*		The interactions with the future leaders indicated that the first and immediate change was an increase in their self awareness and that they underwent immense personal growth during the academy. This is a direct output and was a result that the other outcomes were build upon. Double counting would result if this increase was included in calculations.
	Increased self-awareness and personal growth of future leaders	Immediate Outcome	*This becomes part of the story of change as this happens early on in the value chain creation*		Similar to the future leaders, the leadership forum members reported that the immediate change was an increase in their self awareness and that they underwent immense personal growth during the academy. This is a direct output and was a result that the other outcomes were built upon. Double counting would result if this increase was included in calculations.
	Improved leadership abilities of future leaders	Immediate Outcome	*This becomes part of the story of change as this happens early on in the value chain creation*		It seemed that the future leaders improved their leadership skills as a result of the academies. However, practicing these skills is needed and opportunities to do this do not present itself often in the workplace. It was not included as a measured outcome as it is part of the early chain of events and is captured for those who does present with improved skills with the outcome related to promotion.
	Increased promotion opportunities for Future Leaders	Immediate Outcome	# of promotions of future leaders due to improved leadership (and living the values)	Yes	As mentioned by the Merchants HR manager promotion opportunities for the future leader academy attendants increased.

Group	Outcome	Outcome timing in results chain	Indicator	Included in SROI index	Motivation and evidence
	Increased awareness of disadvantaged youth as part of next generation workforce	Medium term Outcome	# of employees acting in social responsible manner (e.g. doing community work, mentoring, etc.)	No	It seems likely that the CSR engagement between Merchants and disadvantaged learners will lead to an improved understanding of youth as an important part of the next generation workers. This did not realise at the time of the study.
	Improved personal relationships and engagement with entry level workforce	Potential future outcome	*# of new relationships formed*	No	The previous outcome is also related to how staff will engage with new entry level workforce (these are school leavers who are from poor backgrounds). This was also not realised and was more a future projected outcome by Merchants.

Appendix G: SROI MERCHANTS: Centurion College Learners interview
Duration: 2 hours (14:00-16:00, Thursday: 21 Feb 2013)
Participants:
5 learners: 2 Male, 3 Female
1 learner (Grade 12) from 2011 group (Academy 1),
2 learners (Grade 11) from March 2012 group (Academy 2),
                          2   learners (Grade 10) from June 2012 group (Academy 3).

1. Introductions and Purpose

This is an important event and we are very happy that you are able to be here. We are interested to find out what is most important and of most value to you as learners who have been part of the Columba Leadership Academies.

This process says we have to listen very carefully to what our stakeholders say. Stakeholders are people who have some interest in the project. You are very important stakeholders and so we have organised a group discussion which will go on for 2 hours.

During this time, we will have a break, so please do try and stay in the room for the whole process. If you need to leave to go to the bathroom please come back as quickly as you can because your thoughts and ideas are very important.

So what will be doing in this workshop?

We are going to start out by building a stakeholder map – that is we are going to identify all the people that you say are part of the leadership academy at your school.

We are then going to talk about what changes this academy brings to the lives of people and their communities or their schools or families. And we are going to try and work out what the value of this is.

But first please can we introduce ourselves. (Facilitator starts with her name and links this with some actions. The group repeats the person's name and the action three times. All in the group are given a chance to do this. Each member of the group is then asked to think of one word that sums up their impression of having been part of the academy group. These words are all captured.)

2. Stakeholder Mapping

Facilitator puts the stakeholder table template up on the board.

The group is asked to identify all the people that are involved in this academy from the beginning of the process. These are all the people who are interested in the project for various reasons , who support it, who participate in it, and even who put money or resources into it.

| Stakeholder group	Beneficiaries/Contributors/Both	How involved?
Learners	Beneficiaries	Participating in activities
	Contributors	Giving time as contributors to knowledge (act as "teachers to other participants") Giving attention and interest
Educators	Beneficiaries	Learn, especially leadership skills
	Contributors	Knowledge
Deputy principle (Mr Maloi) Principle (Ms Ramaisa)	Beneficiaries	Learn, became exceptional leaders
	Contributors	Knowledge, participation
Merchants Vikki, Adam, Shane, Ross and others – (mention many names especially SAA CC)	Beneficiaries	Learn from being part of activities
	Contributors	Money for Academy (sponsor) Handouts Interest and passion of Vikki NB Presence of Adam appreciated
Columba: Facilitators Rob and wife	Beneficiaries	Learn from being part
	Contributors	Contribute skills and history (experience) Presence of Rob and wife appreciated
Hosts at the lodge	Contributors	Accommodation, Food and knowledge (e.g. game drives)
Not participants of Academy		
Community (neighbours of school) – emerged later on in FGD	Beneficiaries	Clean environment thr Environment campaign (cleaning-up exercise)
Rotary – not part of Academy, but contributed afterwards through networking	Contributor	Contributed resources, time and networking to Library and other activities of group formed at school
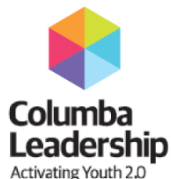
3. Understanding Learner Investment

Now that we have identified all the activities, let us talk in detail about the contribution/investment of yourselves into this programme (probe for time, duration, frequency and other investments).

How would you usually have used the time and resources you put into this academy group? [Guesses]

The stakeholder	Investment/Contribution	How else resources would have been used
Learners	Time Attention Knowledge and wisdom	Rest and relax Sport Read
Educators	Time Attention Knowledge and wisdom Life skills	Teach Mark exam papers
Principle and Deputy principle	Time Attention Knowledge and wisdom Life skills	Teach Mark exam papers
Merchants	Money Time Attention Knowledge and wisdom	[?Make money]
Columba	Time Attention Knowledge and wisdom Life skills	[?Other work]
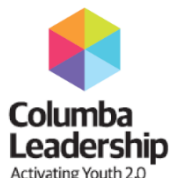
4. Impact

Ask the group to talk briefly about some of the changes they have seen in themselves/others or the school because of the academy. These are the changes that might have taken a bit of time to take root.

The group is asked to explain why they think these changes are important. What do they hope these changes will result in for them in their lives, the functioning of their school and their homes and community?

The stakeholder	The changes	Why significant (what these changes enable – what can be done now that could not be done before)
Learners	Partnerships and networking	We learned how to network, this will be very useful throughout life
	Relationships improved	Different types of relationships improved (e.g. with parents, educators and this mirrors what we need to do in life)
	Learning/Understanding of others	Improved attitude towards learning ("lifelong learning till 60 years), See different aspects of others, understand them better
	Library	The library will contribute to skill of learning (especially since it is a school that has learners from grade R)
	Vegetable garden	Income (money) when selling vegetables
	Environment campaign (ALEC)	Clean environment to come to – less homeless lying around –scaring us
	Outreach to Children's home	Make us thankful
	General Philanthropy	[not much said – vague answers]
Educators	Partnerships and networking	Better relationships with parents and learners
	Relationships improved	Able to communicate across "borders" – with students of other countries
Principle and Deputy principle	Partnerships and networking	Better relationships with parents and learners

The stakeholder	The changes	Why significant (what these changes enable – what can be done now that could not be done before)
	Relationships improved	Able to communicate across "borders" – with students of other countries
Merchants	Library	Made the people from Merchants who attended opening very proud to be involved
Columba	?	?
Community (neighbours of school)	Clean environment through Environment campaign (cleaning-up exercise) Vegetable garden (roof-top)	The reputation of the school improves People can walk and feel better about the streets being clean They will be able to buy fresh and cheaper vegetables
Rotary (NB also Simon as an individual and his company and as International contact)	Solomon Rotary club at school Library	President of Rotary Rotary improved Visual impact of Rotary work

The group is also asked to identify what are some of the barriers or things that can get in the way of these changes happening. These can be called "Lightning Bolts" things that are dangerous to the outcomes being achieved.

- Group members who are not effective enough
- Procrastination
- School mates who influence us not to go to the academy because they thought it was a waste of time
- People never tried to understand what we are all about, especially our class mates
- Some teachers did not like the idea of us leaving for 1 week
- They say we passed due to us being "Columbans"

5. Identifying Key Success Factors

Let us put a star next to the elements here (whether they are people, or activities, or resources) that you think have been the biggest contributors to the success of this academy at your school.

- Time (sacrificing personal time)
- Merchants money
- Merchants leaders attitudes
- Academy
- Library: attitude to get done what needs to be done

6. Attribution and Deadweight

Ask the learners to think about all the other projects or processes happening at their school or their community that they are involved in that may also be helping to achieve the outcomes – could be church programmes, sporting activities, mentoring, the support from educators, government projects etc.

- None, this is the main activity – started group (part of Rotary). They show badges (pins) very proudly.

Ask participants to explain how important the other projects are in producing the outcomes noted. Ask them to explain why these projects contribute to the outcomes.

- Nothing

Also ask participants to share which of these outcomes they think could have come from the other projects alone if the academies did not exist.

- Nothing

7. Valuing the Outcomes

- Could only confirm outcomes (they became very restless after 16:00 even after fetching school bags).
- Also not very valuable input on value of each outcome!

Probe to identify how the changes have enriched learners/families/the schools (gains) or how they have saved money?

- The main discussion was around the interaction with Merchants and specific staff members at Academy, library opening, Visit as part of Business assignment (including CellC), Merchants "open day"
- It was very valuable to see "workplace". Not only for being employed, but also to get insight into what is required to be employed. This goes beyond Merchants and Rotary).
- "We understand the value of a business beyond handing out bursaries, they exposed us and prepared us for work life"
- Inspired: 'I look forward so much to my first day at work".
- Recommended:
  - That parents also attend day at Merchants
  - Others "Everyone" to attend academy
- 'The school got hunters – we went hunting for sponsors and wrote letters.

In terms of Rands ask young people to give amounts what cellphones, cars, clothes etc are worth to them and get them to compare the value of these outcomes relevant to these actual commodities to try and get a financial amount. – **Not relevant info gained**

8. Impact map

Ask the group to think about ALL of the **activities** that have been part of the academy process at the school (in chronological order).

- Introduced to the academy (asked to write essay and 1 group prepare presentation)
- Thought process "I thought about it"
- Discuss with parent/guardian (mother, father, grandparent)
  - "I was not believing in myself – my mom encouraged me"
  - "I wrote it and then showed my mom"
- Write essay – different topics for different years, year 1 also requested to do presentation to Principle, Deputy Principle, LO teacher and Innocent from Columba
- Selected
  - Some negative, envy, jealousy from others – learned to deal with it
  - Celebration (in class and after school)
  - Realise that it is important
- Parents informed
  - Some worries/discussion re payment, etc.
  - Came for introduction, background session by Innocent and Principle
- Logistics (left within 1 week, some after 2 days)
- Academy (1 week, others longer)
  - Learned 1 value per day (all able to recall)
    - Awareness

- - Integrity
    - Perseverance
    - Service
    - Creativity
    - Focus
  - Last day: list priorities of what can be done/changed at school and community
  - GRADUATE (very proud of certificates)
- Face reality
  - Link to priorities
- Plan project (and obtaining critical mass)
  - 2011 1st group planned
    - Challenges especially with regard to group member attitudes (some a bit snobbish)
  - 2012 2nd group joined
    - Some negativity (groups, other learners and educators)
    - Did not give up
    - Encouraged others
    - Made things practical
    - Enticed others to join
  - 2012 3rd group joined
  - Other learners joined (total of 63 learners active in group)
- Projects
  - Environment
  - Library
  - Roof-top garden
    - Meet weekly in Mr Jamba's class

They are then asked to think about all the **inputs** they know about for each of the activities:

- Time
- Money
- Knowledge (education) and wisdom
- Attention
- Life skills

The **outputs** of the various activities are identified next and also written up and posted on the wall. Let us talk about what came out of all of these activities and inputs that we have mapped. For example what were the immediate results of being on the academy? Think about how things were for you and this group immediately after the academy. [most of these related to outcomes on personal level]

- Self-esteem
- Self awareness
- Acceptance of ideas from anyone, acceptance of others

- Self development
- Perspective

Ask the group to talk briefly about some of the **changes (impact)** they have seen in themselves/others or the school because of the academy.

- Partnerships and Networking (connections)
    - Especially Solomon with Simon from Rotary (Solomon is obviously a great inspiration, they know his birthday and is proud that he is now president of Rotary)
- Relationship Change
    - They learned how to share openly with others (especially educators)
- Learning
    - Recognise that "glory comes slowly" (some people receive rewards for being "bad")
    - Not just credits for work, but have to invest and put back
- Projects
    - Library
        - Got other involved (painted and helped lay the carpets)
        - "This will be our legacy that we were at this school"
    - Environmental campaign (ALEC)
    - Roof garden
    - General philanthropy
    - Outreach to children's home

The information already gathered has been stuck up on the wall in sequence (input-outputs-outcomes-impact). The group is given a chance to say if they agree with the map. Changes made in sequence of events for final map.

Theory of change as described by Learners

Appendix H: SROI MERCHANTS: Employed Learners FGD

Anticipated Duration:

1 hour

Groups:

Anticipated one group of those who are employed by Merchants

Group size:

3 employees: 01 MALE and 02 FEMALES

Workshop will take place at the call centre. (Venue and time from work to be arranged with Merchants.)

1. Introductions and Purpose

This is an important event and we are very happy that you are able to be here. We are interested to find out what is most important and of most value to you as learners who have been part of the Columba Leadership Academies.

This process says we have to listen very carefully to what our stakeholders say. Stakeholders are people who have some interest in the project. You are very important stakeholders and so we have organised a group discussion which will go on for 1 hour.

Please remember that you now have insight in changes for yourself, at the school, and perhaps some at Merchants. We would like to get some information on all these as far as it is possible for you.

We are then going to talk about what changes this academy brings to the lives of people and their communities or their schools, business partners (Merchants) or families. And we are going to try and work out what the value of this is.

But first please can we introduce ourselves. (Facilitator starts with her name and links this with some actions. The group repeats the person's name and the action three times. All in the group are given a chance to do this. Each member of the group is then asked to think of one word that sums up their impression of having been part of the academy group. These words are all captured.)

A. Clarify Involvement/and investment in Academy

1. How did it happen that you ended up participating in the academy?

Innocent from the academy came to the school, we were asked to write an essay and present it, then 10 learners were chosen. (1st group 2011).

2. What has been your involvement?

6 days camp,

Merchants sponsored it 100%,

We gave time, sharing knowledge and attention as it was learning experience with fun for everyone, Exchange was important

3. How much time have you put into the academy group?

6 days camp (1 week)

After the camp it was tasks with more challenges

4. What would you have previously done with this time?

School, but there time was filled more conducive

5. Other than your time what else have you invested in the academy group?

Attention and knowledge

B. Stakeholder Mapping

1. Who are all the people that have an interest/stake in this project (they might have contributed something, they may have supported in some ways, they might also have benefitted in some way)?

2. Explain what each invested in the programme.

3. Unpack how these different groups benefitted.

4. Were there any parties who were impacted upon negatively in terms of this academy? Explain.

No

The only challenge was that the principle did not attend the first academy with us. She did not understand and support us until she went to a camp. Thereafter things changed.

The stakeholder	Beneficiaries/Contributors/Both	How they are involved/What they benefitted and/or contributed
Learners	All Both	Everyone learned something and gave something: Knowledge, emotions and their hearts
Educators		
Columba staff		
Merchants' employees		
Rotary Rosebank		

Most of this discussion was similar to learners at the school. The focus then shifted to their experience after the school. Including how they were recruited and came to work at Merchants.

C. Changes

OWN LIFE

1. Has being in this programme had any significant changes **on you and your life**? If yes, please explain.

2. What can or do you do differently because of your involvement in this programme?

3. To what extent are these changes evident – e.g. frequency, duration etc.?

A. Yes, I'm involved with community projects (Orphanage) / Involved with rotary, clicked with Vikky at the camp, and she helped me to overcome family crisis.

S. involved in 2 other projects: sports for inner city schools to form schools' league.

4. What do you hope these changes will mean for/contribute to your future?

RE: BEING EMPLOYED

Avuyile approached Vikki and asked what are changes of employment (especially interested after the school visited SAA CC for a business assignment).

Vikki provided opportunity to everyone. The three of us applied and was accepted.

"they call us interns as if we are different."

We are not working for quest and normally they do not appoint people straight. We had to do the 6 weeks training and this was very hard.

We have a good chance of being promoted (after one year – we have to wait one year).

At Merchants: warm environment, promotions, we can help change some things here – but some people are just happy with what they have no aspirations (they have to pay money to Quest so they get less money than the three of us).

They live the motto: Exceptional Everywhere

6. What have these changes meant? How have they contributed to your life/your school/Merchants?

Employment

Possible fast promotion

7. Have there been any negative changes for you as a result of the programme or your achievements as a result of the programme? If yes, explain.

No

SCHOOL

8. What has changed at your old **school** as a result of the academy? (specify frequency, duration etc and identify most significant change)?

Efforts put up together to implement projects at the school, it was difficult but possible. Structures for ideas such as Library, Recycling project, we contacted Mondi to get bins and also organized other grades to pick up the rubbish in the school.

1) LIBRARY PROJECT: (UNPACKING PROCESS)

We identified this as a project at the camp. Our first aim was to impact at the school. We wanted to create a nice environment for the learners at the school who also had to experience what we had at the camp. Something special.

We realised that our biggest challenge was to have structure. [Illustrates analytical phase]. The idea was to link to an organisation that could give us that structure and provide some mentoring.

Solomon had a friend at Rotary and he networked with him.

2) ALEC PPROJECT (Anti-littering campaign)

We had to contact Mondi for Bins. Apparently people are more prone to recycle if they have bins near them. They don't want to go far.

We also had to organise other grades to help pick-up litter after break. We could not do it alone although we tried.

3) GARDEN PROJECT

This is also due to the involvement of Rotary. Different options were discussed, but they decided on the tyres. Each learner will now be responsible for their own tyre garden.

4) INTER ROTARY CLUB

Due to our involvement with Rotary we could connect to other schools. We rub shoulders with schools such as St Johns and Queens. They also now started projects. They were inspired by this poor school from the inner City. Perhaps one day they will offer some of Centurion learners scholarships or bursaries to also study there. Especially those who are good in sport and did not get any opportunity at Centurion. [Not clear if this is a wish or reality at present]

SOLOMON talks about two projects that he would like to start (mostly through Rotary link):

1) Inner city school sport leagues

He has spoken to Gauteng Cricket Club and also wants to involve PSL and Rugby). Children from the inner city needs to get to sports grounds, through leagues they will be exposed to scouts and coaches and might be selected or get sponsorships/bursaries that could lead to good quality education

2) Linking with a business woman he wants to become involved in het anti-rape campaign, but focus on men's involvement. (Part of One Billion Rising)

AVUYILE linked to Vikki at camp and Vikki became her mentor.

She inspired her because she shared similar challenges in her life.

9. How do you believe these changes will impact on the future of the school? (specify)

This will depend on individuals, but now you have an opportunity that you did not have. I would be sitting at home.

10. Have there been any negative effects at/for the school as a result of the academy programme? (explain).

MERCHANTS

11. Do you think anything changed at **Merchants** as a result of the academy? (specify frequency, duration etc and identify most significant change)?

12. How do you believe these changes will impact on the future of Merchants? (specify)

13. Have there been any negative effects at/for Merchants as a result of the academy programme? (explain).

NO

D. Valuing the Outcomes

1. In terms of the different changes identified, what are the values of each of these? For
Yourself: Employment made a big persona impact after losing a family member.
Centurion College: Higher pass rate, students are more active now in school projects

Merchants

E. Deadweight

1. What would have happened anyway **for you** without the Academy?

U: Studying, doing courses, will be ignorant about many things, less aware of other people, I'd be less than today as I treasure learnt lessons from past experiences.

2. What would have happened at **Centurion College** without the Columba Academy?
Av: Probably closed down as the Dept of education sent an ultimatum for closure because the Matrics pass rate was around 70%. [I TRIED TO VERIFY THIS, BUT TEACHER FROM OTHER SCHOOL IS NOT AWARE OF THIS RULE]
Also there was no structure, no sports activities, no motivation, no library.
So: "I take lessons from everything in life" All this made a huge difference to my life.

WHEN ASKED IF THEY ARE MENTORING OTHER'S THEY SAY THEY DO NOT HAVE TIME. THEY HAVE NOT GONE BACK TO THE SCHOOL TO TALK TO LEARNERS THERE OR INSPIRE THEM.
Possible recommendation to Columba to use or create opportunities for "groundbreakers" to inspire others at the school.
Mentorship came through as a very important theme.
Uv: Vikki
So: Personal mentor from church. Same background, I learn humility (she is one of 20 best business women in SA).

3. What would have happened at **Merchants** without the Academy?

Not that involved yet to know.

Perhaps persons below Future Leaders should also go on the camp.

Both of them want to attend a camp as Merchants employees. Feel they can do a lot of good there. We will be able to give back, we have the best understanding.

[RECOMMENDATION TO COLUMBA AND CYCLE OF INFLUENCE NB]

F. Attribution

1. Who or what other programmes have contributed to the success that has been achieved at this school? Probe external or local people, government, other organisations, church groups etc.

Centurion College and Merchants

Merchants' Image to you:
Merchants is a company that assist people and help them to grow.

ASKED ABOUT NUMBERS WHO KNOW ABOUT ACADEMY:
Not so much, some are informed, but it did not change them.

2. Allocate a percentage of each parties to the different outcomes achieved.

G. Duration/Drop Off

1. How long do you think the changes in your school will remain?

It will last as long as Merchants & Columba involved with the school, Columba should follow up and check on schools, and also do workshops with other learners / schools

2. How long do you think the changes for other learners at the school will remain?

Don't know

3. How long do you think the changes for you will remain?

It will remain with me all my life as it was a life changing experience; simply it's now engraved in me, I'd would like to go back to the school and motivate other students who are in the same situation, same as happened with me, also go back to the camp and motivate other learners. I want to share my experience with others, and mentor other as I personally have someone who has a strong influence on me.
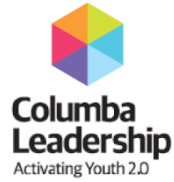
4. How long do you think the changes will remain for Merchants?

Don't know

H. Closing

1. Is there anything else about the impact of this academy that you think we should know?

It will bring joy to Merchants to see what happened.

2. We value your input. Might we phone you if we need any other information? Yes

3. Is it ok if we include some of what you have said as quotes in the report? Is there anything you would prefer us not to report on?

Quotes:
"Merchants didn't waste their money on the academy at all"
"The amount of money Merchants paid is so small comparing to the amount of gained knowledge"
"Merchants might not stay in my mind but the lessons learnt will stay for the rest of my life"