

## Demonstrating Value:

A final report on the Community Sector Council's Social Return on Investment Pilot Project

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A final report on the Community Sector Council's Social Return on Investment Pilot Project

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At the Community Sector Council NL, CSC CEO Penelope Rowe was the driving force behind the project, recognizing a chance to turn the sector's need for new tools into an opportunity for innovative work to be done across the province. Senior Program Associate Darlene Scott assisted in developing the assessment methodology and interviewing participants to provide data for this report. Both were a great help with this report. At nef consulting in London, Natalie Nicholles and Jonathan Schifferes got the very best out of every participant, even from a distance.

### Foreword

One of the significant roles of the Community Sector Council Newfoundland and Labrador (CSC) is profiling the role and advancing understanding of the community sector. This sector (generally referred to as the voluntary or nonprofit sector) is, alongside the private and public sectors, a key economic player. The community sector is less well understood than these other sectors, and is often perceived as peripheral to the real workings of the economy. The significance of community organizations and the role they play in fostering regional and economic development as well as in providing essential infrastructure at a community level is not so well recognized or appreciated.

CSC along with many colleagues has desired to find ways to demonstrate the value of the work of their organizations. It became evident that new methodologies should be used to find hard evidence of the value - the return on investment - of funds and time invested in organizations.

CSC, which has a reputation for looking at innovative approaches and programming, determined it was time to introduce new methodology in our province. The end result was this pilot project on the Social Return on Investment. In 2010 CSC organized a gathering, New Thinking for the Next Decade. We were fortunate to connect with the new economics foundation (nef) in the UK. We then partnered with a number of community organizations and colleagues in the Provincial Government and ACOA who became genuinely interested in exploring this methodology. Collectively we developed a foundation for an intensive pilot project. Twelve strong community organizations and one government program agreed to engage in individual SROI analyses. Together we have been

through an extraordinary journey. The engagement of funding partners, nef, organizational participants and CSC has produced a ground breaking undertaking which has not only displayed the valuable return on investment for individual groups but will add to world-wide knowledge of SROI.

CSC is pleased to have been the instigator and manager of this pilot and to have convened the players to make the pilot possible. We tip our hats to the groups who came on board to explore this process at considerable financial cost and human effort. Their engagement was huge and will lay the groundwork for further work in this field. We thank them sincerely. Initial trepidation has turned to satisfaction in that they have all learned the value of what they do. They have also gathered information which has enabled them to strengthen their own services.

Participants in this project discovered many ways in which they create value – as many other organizations certainly would if they were to undertake an SROI of their own. This work will surely help to signal to skeptics the merit of investing in the community sector.

On a personal note, my heartfelt thanks to those who took the risk of joining us on this journey including our colleagues in the Provincial Government and ACOA who committed to this work and made it possible. Innovation is based on the willingness to take risks. We all did, and we have, I believe, provided a foundation for continuing support for innovation in the community sector.

**Penelope Rowe, CEO**  
**Community Sector Council**  
**Newfoundland and Labrador**  
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## Executive Summary

Community organizations are searching for better ways to demonstrate the value of their work, to understand the causal relationships behind it, and to make its delivery more efficient.

As an organization whose mandate is to serve the many community groups in Newfoundland and Labrador, the Community Sector Council NL has regularly heard this need from its partner organizations, and is always looking for innovative ways to help the sector do its work even better. Social return on investment (SROI) analysis is one approach gaining usage as a solution to this challenge. It has seven stages:

- **Establishing Scope**  
Organizations decide what program to study, and over what time period.
- **Identifying Stakeholders**  
Organizations identify all the people affected by the work of their program.
- **Impact Mapping and the Theory of Change**  
Organizations reach out to their stakeholders to ask them a simple question: “How do we make a difference in your life?” The causal relationships and outcomes identified are combined in a theory of change that describes how the organization creates value.
- **Evidencing and Valuing Outcomes**  
Organizations develop indicators that measure the outcomes they have discovered, and survey their stakeholders to find out how much change is happening. Once this is known, they use financial proxies to put dollar values on non-monetary outcomes.
- **Establishing Impact**  
Organizations account for how much change would have happened without the program, the role of other people and groups, and whether value is being created or relocated.

- **Calculating the SROI Ratio**  
Organizations add up the dollar values of all the outcomes they can claim for their work, and present a ratio showing how much value is created for every dollar invested.
- **Reporting, Using, and Embedding**  
Organizations report their results and use them to refine how they do their work.

Seeing potential merit in the SROI methodology, CSC assembled a pilot project that would take a group of organizations from Newfoundland and Labrador through SROI analyses of their work, guided by CSC and staff from the consulting arm of the new economics foundation (nef) in London, UK. The new economics foundation has been heavily involved in developing SROI worldwide.

With funding from ACOA and the Government of Newfoundland and Labrador, CSC took on a developmental phase and issued an open call for expressions of interest. This brought together a pilot group of 13 organizations: 12 community groups and one government program. With the group assembled, the CSC assembled resources for a full pilot project, with contributions from ACOA, the Government of Newfoundland and Labrador, and the participant organizations.

Through a mix of in-person sessions and remote support, CSC and nef staff guided these organizations through their SROI work. The project operated on a capacity-building model, building SROI skills within the participant groups. It was spread over more than a year and involved up to 50 person-days of time per group.

The pilot group broke significant ground in its diversity. Organizations were of varying sizes, came from very small communities as well as larger cities, and were engaged in a wide variety of types of work. The headings that follow are the criteria CSC used to assess the project.

### **Participant Capacity-Building**

There was significant capacity built and internal growth/change for all participants. There is evidence of plans to extend that throughout their organizations, but this has yet to happen on a large scale. Conceptually, project participants reported a new appreciation for evidence-based inquiry, a new understanding of the power of client consultation, and an understanding of outcomes. Practically, they reported major improvements in research and data analysis skills.

### **Using SROI to Show the Value of Investments in Community Groups**

All organizations had some plans to promote their results, whether internally to their board, to funders, or to other organizations in their field. They all felt a strong improvement in their ability to tell their story and demonstrate the value of their work. It is worth noting that in every single case, the value of social and environmental outcomes was greater than their economic impact.

### **Types of Work Suited to SROI**

There were significant innovations here. SROI is most commonly (and most easily) applied to social service providers. Project participants, however, established that SROI could be a good fit to social enterprises and groups that network other groups. The social services in the project innovated by finding much value in well-being outcomes for participants, rather than in avoided costs for the justice or health system.

### **Building a Body of SROI Expertise**

The project generated many shared proxies and indicators that organizations working in Newfoundland and Labrador felt were appropriate to their work – but a number of them should also be applicable on a Canadian, or even an international level. There was strong

recognition that further development of SROI expertise requires support from skilled staff.

### **Potential for Wider Use**

There is clear potential for SROI. Participants felt that it was a powerful way of telling their story. To fully develop that potential, elements of the process should be refined to place smaller demands on participants' time. External review of results is essential for perceived reliability, and there is clear need to educate funders and the public on SROI concepts.

### **Project Satisfaction**

Organizations were highly satisfied with the project, with much satisfaction tied to their support relationships with the project staff. The time commitment was a challenge for many. Organizations felt very confident in their SROI results, and felt comfortable defending them publicly. They were also confident in the proxies used to assign dollar values. Participants were happy to be participating in innovative work and felt more able to tell their stories effectively.

### **Opportunities for CSC to Expand Delivery**

CSC emerges from this project in a position to deliver SROI support, and plans on pursuing formal accreditation. The project provided a clear picture of what this support would look like. CSC will continue building partnerships to share best practices and innovations from this pilot, and will work to build awareness of SROI in Canada.

### **Conclusions**

This project established that SROI has significant merit and warrants further development. It showed itself quite adaptable to a variety of circumstances. Project participants innovated in terms of the breadth of work studied, the small size of the participating organizations, and the ability to attach a value to community connection and sense of place.

### Introduction

This report summarizes the results of a pilot project in Newfoundland and Labrador that, over the course of more than a year, brought 12 community organizations and one government program through a social return on investment (SROI) analysis of their work. This is a methodology that seeks to show the full value – economic, social, and environmental – of the work that organizations and programs do.

People are drawn to the SROI methodology for a number of reasons. For many, it represents a chance to state with confidence the size and shape of the impacts they have been aware of for years. For others, SROI is an internally focused process that helps them choose the most efficient paths towards an outcome. For all, it is a chance to connect or reconnect with the clients whom they serve.

Context also matters. Funders of both community organizations and government programs are placing increasing emphasis on results – and on rigorous evaluation. At times, this leads to tension when organizations feel that that an evaluation framework isn't a good fit for the work they do. SROI provides a way to feel a sense of ownership over the evaluation process – and confidence that the results will be rooted in their clients' expectations and experiences.

Although SROI concepts are increasingly familiar to both nonprofits and governments, there is still a great deal of room for assessment:

- How would it work in a Canadian context?
- Would it be within reach for the smaller organizations that dominate outside of major cities?
- Is SROI more suited to some types of organizations? Which ones?

Beyond practicality, there are also questions about SROI's efficacy:

- Would it deliver a process and a set of results that organizations would feel confident in? What about funders and the broader public?
- Could SROI become a part of the organizational "toolbox" for community organizations and government programs to demonstrate the value of their work?

With these questions in mind, the Community Sector Council NL (CSC) took on several distinct roles throughout the pilot. It orchestrated the overall approach to the project and served as the project lead, connecting the participant organizations to each other and to expert support from both CSC and the consulting wing of the UK-based new economics foundation (nef consulting). CSC was also a participant – it analyzed its own Student Work and Service Program (Community Service Component). Finally, the CSC took on an assessment role, looking critically at the experiences and expectations of the project participants and at the broader implications.

The project was supported by funding from the Atlantic Canada Opportunities Agency (ACOA), the Government of Newfoundland and Labrador, and the participants themselves, who each paid a \$4000 fee to bring their organizations through the process. Two organizations applied for and were granted subsidized spaces – allowing organizations with fewer resources to participate equally.

This report will provide an overview of the SROI method and an assessment of the merit and value of the social return on investment methodology.

## SROI: A Brief Overview

Social return on investment analysis is a way to tell the story of how an organization or program makes a difference – and back that story up with data, context, and analysis. The basic concept is simple: every project is based on an investment, whether in cash, in time, or in-kind support. All these investments eventually lead to outcomes – real changes in the lives of people or the environment. These outcomes have value. SROI analysis helps create a meaningful conversation about how those three things – investment, outcomes, and value – are connected. Organizations use SROI to prove how much value they are creating, and improve their own operations. An SROI analysis involves seven stages:

Stage	Description
<b>Establishing Scope</b>	In this stage, organizations decide what programs to analyze and for how long, assessing what resources are available for the process, and deciding who will do the work. SROI analyses can be evaluative (looking back at a completed program) or forecasting (looking forward to project expected impact). Evaluative project are more common; all pilot participants took this route.
<b>Identifying Stakeholders</b>	This stage involves discovering who is impacted by the activities being studied and deciding how to involve them in the SROI process. Key here is the concept of a “material stakeholder.” These are the people who factor into decision-making about a program; SROI looks at impacts on them while setting aside more distant stakeholders.
<b>Building an Impact Map and a Theory of Change</b>	The key to this stage is getting the material stakeholders involved to map the impacts of the studied program on their lives. This involvement can take many forms – focus groups and interviews are most common. The results are combined in a <b>theory of change</b> that describes the causal relationship between the inputs of time/money into the program and the outcomes the stakeholders identify.
<b>Evidencing and Valuing Outcomes</b>	This stage focuses on finding indicators that track whether outcomes are happening, how much change is occurring, and for whom. With indicators chosen, organizations then collect data from a wide sample of stakeholders – typically through surveys or questionnaires. The data is most often in “distance-travelled” form that describes how far a respondent has come over a fixed period of time with regards to a particular outcome. This provides data on <b>percentage change</b> . To translate this data into dollar values, this stage also involves researching and applying financial proxies. This is often done by looking for places where people do pay in for a similar outcome.
<b>Establishing Impact</b>	This stage involves filtering the data to determine how much of the outcomes are actually a result of the program being studied, as opposed to things that would have happened anyway or changes that are a result of someone else’s actions. It also involves looking into whether the program is creating new value, or shifting value that another program would otherwise have created. The numbers involved are typically captured through a mix of questions to stakeholders and workshops with staff.
<b>Calculating the SROI Ratio</b>	Calculating the total present value of all outcomes (expressed in money terms) then dividing that by the value of all inputs (cash and in-kind) produces the <b>SROI ratio</b> , a number that indicates how much social value is created for each dollar’s worth of investment.
<b>Reporting, Using, and Embedding</b>	The results of the SROI analysis are used to inform stakeholders and help improve programs, while the SROI method is embedded into an organization’s strategic planning process.

## Principles of SROI Analysis

There are seven principles that represent best practice in social return on investment analysis, as set out by the SROI Network and the UK Cabinet Office for the Third Sector in their definitive *Guide to Social Return on Investment*

Principle	Description
<b>Involve stakeholders</b>	It is the people who are being affected by a change who are best placed to describe it and guide the SROI analysis. These stakeholders must first be identified and then involved in the process. Their input will shape understandings of what has value and how that value should be measured.
<b>Understand what changes</b>	A SROI analysis needs to clearly identify the positive and negative changes that are created by an activity, whether intentionally or unintentionally. These need to be tied together by a theory, supported by evidence, which describes how the changes came to happen.
<b>Value the things that matter</b>	Using financial proxies allows a commonly understood measure of value – money – to be used to describe things that aren’t actually traded in the market. This shifts the balance between stakeholders by recognizing that social and environmental costs and benefits are as much a part of determining “value” as direct financial impacts.
<b>Only include what is material</b>	Every effort must be taken to provide all the information and evidence necessary to provide an accurate, full, and fair picture of the activity being assessed. If a certain piece of information could cause someone to make a different decision about the activity, then that type of information must be included. Anyone who reads the story told by an SROI analysis needs to be confident that all the material issues have been included.
<b>Do not over-claim</b>	It is important not to take credit for change that would have happened anyways, or is the result of other people or organizations. This involves a careful analysis of social trends and benchmarks and comparisons with control groups elsewhere to isolate the impact of the specific action being assessed for SROI.
<b>Be transparent</b>	The results of an SROI analysis are dependent on a series of choices about who and what to include, what outcomes to measure and how to measure them, and how the data is collected and analyzed. All these choices need to be documented and explained. The explanation should also extend to an explanation of how the results of the analysis will change the activity. Taken together, this transparency lends credibility to the project in the eyes of stakeholders and the public..
<b>Verify the Result</b>	Having the results and process reviewed by an independent, external party is very important. It will help stakeholders judge whether the many assumptions that are made in the course of the analysis were reasonable and whether the resulting conclusions are valid.

Much more detail on SROI principles and practice is beyond the scope of this report, but can be accessed through the *Guide to Social Return on Investment Analysis*, recently updated and available at:

[http://www.neweconomics.org/sites/neweconomics.org/files/A\\_guide\\_to\\_Social\\_Return\\_on\\_Investment\\_1.pdf](http://www.neweconomics.org/sites/neweconomics.org/files/A_guide_to_Social_Return_on_Investment_1.pdf).

## SROI: History and Context

The SROI methodology was developed in the early 2000s, initially at REDF in San Francisco. Groups of practitioners from around the world worked over the next several years to refine it. This global community of practice is now formalized through the SROI Network, which works to ensure adherence to the principles and standards of SROI, develop the methodology, share indicators and proxies for use in SROI analyses, train SROI practitioners, and provide peer support.

The London-based new economics foundation (nef) took on development of the methodology in the UK, where it was further refined with the support of the UK and Scottish Governments in the Guide to Social Return on Investment Analysis. Produced by a consortium of organizations (including nef) and released by the UK Cabinet Office for the Third Sector, it lays out standards of practice for SROI practitioners. It was last updated in 2011.

The UK remains the jurisdiction where SROI is most solidly established. There has been a significant effort on the part of both the UK and Scottish governments to develop new methods of measurement and delivery in their social sector; SROI has played a part in this shift.

SROI work is by no means confined to the United Kingdom. The methodology has been applied worldwide, notably in Australia<sup>1</sup>. In Canada, there is a growing interest in SROI. In Calgary, the city's Family and Community Support Services has produced SROI analyses of a number of programs they support, and is working to

integrate SROI into their planning frameworks for future programming.<sup>2</sup> Toronto's Social Capital Partners, a nonprofit consultancy, produced a series of SROI reports for community enterprises in communities across the country, including Vancouver, Winnipeg, and Quebec City.<sup>3</sup> The Saskatchewan Abilities Council has recently completed some SROI studies of their programs<sup>4</sup> and the Toronto-based charity Kids.now has been the subject of an SROI analysis taken on through the Rotman School of Management.<sup>5</sup>

The beginnings of a community of practice are emerging in Canada. There is a network, SROI Canada, which connects SROI practitioners to each other and is building a database of proxies. Several nonprofit consultancies are taking on SROI projects or offering SROI seminars. In Canada, the Newfoundland and Labrador pilot project has been unique, in that the participants took on the lion's share of the work themselves.

To date, Canadian SROI practice has been concentrated around social service agencies and charities working with clients facing barriers either to employment or to personal stability. The CSC pilot group was ground-breaking, in that it included a much wider range of programs and activities than has yet been studied through SROI work in Canada, and that all these organizations worked collectively to complete their SROI. The implications of these distinctive aspects will be discussed in the conclusions of this report.

<sup>1</sup> *Social Return on Investment Lessons learned in Australia*, Prepared by Social Ventures Australia Consulting, February 2012, <http://www.socialventures.com.au/wp-content/uploads/2012/01/SROI-L6.pdf>

<sup>2</sup> *Social Return on Investment*, FCSS Calgary, <http://www.calgary.ca/CSPS/CNS/Pages/FCSS/Social-Return-on-Investment-%28SROI%29.aspx#sroi>

<sup>3</sup> *SROI Reports*, Social Capital Partners, <http://www.socialcapitalpartners.ca/portfolio/sroi-reports>

<sup>4</sup> *Our Case Studies*, Saskatchewan Abilities Council, [http://www.abilitiescouncil.sk.ca/html/SROI/our\\_case\\_studies/index.cfm](http://www.abilitiescouncil.sk.ca/html/SROI/our_case_studies/index.cfm)

<sup>5</sup> *SROI Study*, Kids Now Canada, <http://www.kidsnowcanada.org/partners/social-return-on-investment-study/>

### The SROI Methodology: Critiques, opportunities, and commentary

Since its development in the early 2000s, there has been a lively discussion around elements of the methodology, as well as the implications of SROI work for those who take it on. While a full review of the literature on SROI as a method is beyond the scope of this report, a short summary of some of the primary questions is a useful way of framing the thinking involved in CSC's project assessment. The points below emerge from an academic report on this topic by the UK-based Third Sector Research Centre<sup>6</sup>.

#### Getting to the data

Many community organizations have relatively limited capacity for collecting data from the people and communities they work with, and may lack the capacity to analyze and interpret such data if they do. Without good data, it is impossible to take on a meaningful SROI analysis. Building this capacity was one objective of CSC's pilot project, and the results of that effort will be reported in this report.

#### Subjectivity and judgment

One of the more common challenges to SROI revolves around judgment. The organization taking on an SROI is involved in choosing what indicators will be used to evidence the outcomes being studied. The concern is that organizations may "cherry pick" for indicators that lead to a certain result. SROI practitioners would argue that this tendency is counteracted by the transparency of the SROI process and the assumptions contained within it.

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<sup>6</sup> *Third Sector Research Centre Working Paper 49: The ambitions and challenges of SROI*, Malin Arvidson, Fergus Lyon, Stephen McKay, Domenico Moro, 2010, <http://epapers.bham.ac.uk/788/>

### Understanding the mechanisms

For SROI to be useful to an organization who takes it on, and to those reading the results, the causal relationships outlined in the theory of change need to be realistic and compelling. As a methodology built around the measurement of impacts, SROI analyses may not always be able to fully capture the mechanisms behind them; this is a challenge to those who would use the SROI results to *improve* procedures as well as *prove* value. The solution to this particular problem, so much as there is one, rests largely in the level of attention paid to the theory of change process.

### Impacts on organizational priorities

There is some concern that SROI's emphasis on quantitative measurement might lead organizations to focus on those programs that are more easily quantified/linked to well-being results, at the expense of valuable but harder-to-capture programs elsewhere. To some extent, this works over a longer term than this pilot can capture. Should this tendency exist, though, it should be counteracted by rigorous work in the early stages of SROI and the report-writing stage.

### Applying dollar values

The element of SROI that elicits the most skepticism is the process of using financial proxies to assign values to non-monetary outcomes. There is a particularly strong debate about the use of cost savings to represent value - for example, if a program prevents a client from getting sick, the state is not required to treat them. The challenge here is that in the real world, money not spent on one client will generally be spent on another, rather than saved. The amount the state is willing to pay for an outcome may also not reflect the value of something *to an individual*. In response, it could be argued that these costs represent a dollar value at a *societal* level for a given outcome. Nonetheless, where possible, SROI work done in

this project did lean away from these types of measurements and toward a more direct willingness-to-pay approach.

### **Role of Volunteers**

Some critiques of SROI have focused on the challenges of properly valuing the input of time and energy from volunteers, something important for many community organizations.

### **Deadweight, Attribution, and Displacement**

The complex questions of “What would have happened anyway?” and “How much credit can we take?” can be challenging to gather meaningful data on, and may be sensitive to the assumptions built into the modeling process. By and large, SROI aims to avoid these issues by asking stakeholders these questions directly – the willingness of clients to provide answers to these types of questions was a salient feature of the project for many of the participants.

### **Reporting the Results and the Ratio**

An obvious challenge when dealing with SROI results is the temptation to focus on the ratio to the exclusion of the relationships and storytelling beneath it. As a related point, there is some temptation to directly compare ratios from unlike organizations; given the complexity and specificity of SROI results, this is not a meaningful way of assessing the relative benefits of two programs. The pilot project participants definitely recognized this challenge, which was dealt with largely through training them, as well as government staff, in how to understand results.

### **Cost**

SROI is a cost and labour-intensive process. Some critiques of the method would argue that it is prohibitively so, due to the intensive research and data-gathering commitments involved. Assessing the degree to which this proved to be a barrier for the pilot group was clearly an important point.

### **Potential Benefits**

Before beginning the project, and based on a review of SROI analyses that other groups have taken on, the CSC identified a number of potential benefits to participant organizations.

### **Demonstrating Value**

The focus of SROI analysis is on measuring all the value a program creates. For some organizations, this provides a tool with which to speak to funders. For others, it offers a chance to redefine the ‘story’ being told about their work by capturing how and where they create value.

### **Making Connections**

As a stakeholder-focused methodology, SROI relies heavily on intensive engagement with the people and places benefitting from a program. It offers groups a chance to build relationships that last well beyond the period of the study.

### **Research and Technical Skills**

At its core, SROI involves basic social-science research: gathering data through surveys and focus groups, reviewing secondary literature, and formulating conclusions. The technical aspects have to do with manipulating data and working with spreadsheets. All of these are skill sets that offer benefits to the participant organizations should they be internalized.

### **Understanding**

SROI offers a chance for organizations to better understand the mechanisms by which they are meeting (or not meeting) their goals, and a way to ‘check in’ on programs that may be working quite differently from the way they did at their creation.

Assessing how these opportunities and challenges played out, and the implications for SROI practice, is the focus of the remainder of this report.

## Pilot Project Background and Participants

### i. Pilot Project History

The Community Sector Council of Newfoundland and Labrador is an independent organization promoting social and economic well-being. Its goal is a prosperous and inclusive society that supports individuals, families and communities.

The mission of CSC is to encourage citizen engagement, to promote the integration of social and economic development and to provide leadership in shaping public policies. It does this work in partnership with the community sector, made up of the many different organizations working towards community objectives and governed by volunteer boards.

A common theme in CSC's discussions with its community sector colleagues has long been the desire for tools to demonstrate the value of the work that they do. In every community, these organizations play a vital role. This is sometimes recognized, sometimes not – but even when recognized, it is too rarely quantified. Community groups want to know how they create value, how much they create, for whom, and how they can create more.

This is not, of course, a discussion that only happens in Newfoundland and Labrador. There has been recognition for some time in the broader community sector that improving the tools organizations have at their disposal to understand impact is a key step towards increasing it.

With this challenge in mind, the CSC began to explore the different methodologies being developed to address it. Social return on investment (SROI) struck CSC as having significant potential, and in late 2010 CSC made contact with the new economics foundation (nef).

Based in London, UK, nef was a driving force in developing and standardizing the SROI methodology, a process that culminated in the publication of the Guide to Social Return on Investment by the UK's Cabinet Office for the Third Sector. This guide, co-written by nef, lays out the best practices for SROI globally.

In late September 2010, the CSC invited Natalie Nicholles from the new economics foundation's consulting wing (nef consulting) to St. John's as a keynote speaker at "New Thinking for the Next Decade", a conference of community, government, and private sector leaders organized by the CSC. Ms. Nicholles also delivered a daylong SROI workshop to a group of community leaders and senior representatives from the federal and provincial governments.

At the close of that workshop, there was a great deal of interest in further exploring SROI's potential. Recognizing that a large-scale pilot project would be a significant undertaking, CSC first applied to ACOA and the Government of Newfoundland and Labrador for funding to undertake a developmental phase. During this phase, CSC developed the structure and goals of the project with the aid of a guidance committee, and reached out to assess interest in the project. After a flood of emails and full houses at both in-person and online information sessions, the CSC was confident that there would be sufficient interest from community groups.

After issuing an open call for expressions of interest, a group of 13 organizations emerged – including one government program who would take their own work through the SROI process to assess its applicability within government.

At this stage, a formal application for project funding was successfully made, with the costs of the project divided between the Government of Newfoundland and Labrador (Provincial

Government Programs), the Atlantic Canada Opportunities Agency (ACOA), and the participants themselves (through a fee of \$4000, with two reduced-fee spaces set aside).

## ii. Structure

The SROI Pilot Project was designed on a capacity-building model. Under this model, the participants took on all the necessary tasks to complete their own SROI, with support, resources, and review from CSC staff and nef consultants. This is not the only possible model for SROI – in some cases consultancies such as nef will take on the entire SROI themselves for a client – but in the case of the pilot project moving to a capacity-building model was both an opportunity to add value to participant organizations and to assess the ability of a variety of organizations to develop the necessary research and data analysis skills.

The one exception to the capacity-building model was in the construction of Excel™ spreadsheets that were used to calculate the final SROI results; CSC and nef staff were involved in setting up the necessary calculations within these spreadsheets, using data entered into them by participant organizations. This was to ensure that calculations were being made in a consistent way across all the analyses done through the project.

With support being delivered by UK-based consultants, the pilot project relied on a mix of in-person visits for intensive training and remote support via email, telephone, and Skype™. The project involved six distinct phases. With an additional wrap-up meeting added and some extra time provided to groups to complete their reports, the project timeline expanded from 12 months to 15.

- 1) An initial 2-day SROI training workshop for participants in St. John's in September 2012, led by staff from nef consulting.

- 2) A 1-day project planning workshop immediately following the 2-day training, led by nef and CSC.
- 3) Consultations with stakeholders, building a theory of change, designing data collection tools, and collecting data. This work was spread over a period of seven months and was supported remotely by nef and CSC staff through email, Skype and teleconferencing.
- 4) A 2-day in-person workshop in St. John's at the project midpoint in April 2012; nef and CSC staff assisted participants in building their model and analyzing the data collected over the first seven months.
- 5) Work to finalize models, analyze data and produce results. This was spread over approximately six months and supported remotely by nef and locally by CSC.
- 6) Completion of SROI reports and summaries. Supported by CSC, organizations finalized the documents used to present their results.
- 7) Assessment of the project by the CSC.

It is worth noting that within this basic structure, there was some variation between groups. Some groups worked more intensively with nef consultants, while others worked more closely with CSC. Some groups also worked through individual stages of the project at faster or slower paces than others. These variations in working style were encouraged – it helped CSC understand how to offer the best support in a variety of contexts.

### iii. Professional Support

The project was coordinated by the Community Sector Council NL, with leadership and oversight from CSC CEO Penelope Rowe. CSC Project Associate Josh Smee coordinated project logistics, connected participants to each other and to consultants from nef, and provided direct support to participants as they worked through their SROI analyses. Corey Weir, CSC Assistant Coordinator (SWASP), provided support and training on Microsoft Excel.

Natalie Nicholles, Associate Director, and Jonathan Schifferes, Senior Consultant, nef consulting were hired to provide step-by-step ‘handholding’ for the participants as they moved through the project. They led the in-person training component of the project, prepared templates for groups to use for each phase, reviewed and provided feedback on participants’ work, and built Excel-based SROI models for participants.

Part of the project’s capacity-building focus was directed at CSC itself; over the course of the pilot project the CSC’s Josh Smee was familiarized with the different elements of the SROI process and was able to provide significant support directly to the participants. He was involved in supporting all phases of the project, including the building of Excel models. This creates a capacity at CSC to take on further SROI projects with minimal assistance from nef.

### iv. Participating Organizations

A total of 14 organizations joined the pilot. One organization withdrew early when some internal changes left them without the staff time necessary for the project. A total of 13 organizations (12 community groups and one government program) then formed the pilot group and went

on to complete their SROI analyses. As shown below, the pilot group was diverse:

Organization	Location	Full- time employees
<b>AE</b>	St. John’s	75
<b>CHHA-NL</b>	Mt. Pearl	7.5
<b>CNIB</b>	St. John’s/Toronto	18 (Local Office); 1,100 (National)
<b>CEN</b>	Stephenville	40
<b>PaBCEC</b>	Port aux Basques	31
<b>DPCC</b>	Corner Brook	10
<b>FSN</b>	St. John’s	4
<b>GMCA</b>	Rocky Harbour	7
<b>LFC</b>	Goose Bay	35
<b>OIM</b>	St. John’s	18
<b>SSNL</b>	St. John’s	3
<b>SABRI</b>	St. Anthony	3
<b>CSC (SWASP)</b>	St. John’s	2 (SWASP)

#### Avalon Employment Inc. (AE)

Avalon Employment Inc is a not for profit employment service for individuals with barriers to employment. They have been serving the community since 1992. They assist individuals in finding long term paid employment. They currently serve about 120 individuals each year, assisting individuals in accessing over 65,000 hours of paid employment each year. Where required, Avalon Employment will assist in any long term supports to maintain employment. They service the Northeast Avalon Peninsula.

#### The Canadian Hard of Hearing Association NL (CHHA-NL)

CHHA-NL provides programs and services to support hard of hearing persons to have fully interactive and accessible lifestyle, so that they can communicate fully with others with confidence and ease. There are three main areas of focus: hearing accessibility wherever and

whenever needed, creating awareness of hearing loss issues (prevention, supports, etc.), and advocating for the rights of persons with hearing loss, either individually or systemically.

### **CNIB**

CNIB is a national organization that provides rehabilitation services and support programs directly to people living with vision loss. They also undertake and support research to inform their service programs. They advocate with consumers to help break down barriers to inclusion. CNIB's Newfoundland and Labrador work was studied in the pilot project, led by research staff from the Toronto head office.

### **Community Education Network (CEN)**

Community Education Network is a not-for-profit community based organization in Southwestern Newfoundland. It works to foster a community wide interest in learning, and to provide both the means to learn and specific opportunities relevant to the area's social and economic challenges. CEN addresses these challenges using a holistic approach: one that considers lifelong learning within a community context as a central part of the solution. It is characterized by the involvement of people of all ages, the use of community resources, research to bring about community change, and the recognition that people can learn through, with and for each other to create a better world.

### **Community Employment Corporation – Port aux Basques (PaBCEC)**

The Port aux Basques Community Employment Corporation (PaBCEC) was incorporated in 1987. The initial mandate of the PaBCEC was to provide employment services to residents with a developmental disability in the South West Coast region, utilizing the Supported Employment Program. The Corporation has experienced

substantial growth over the last number of years and its objective has broadened to provide both educational and employment counseling to individuals who are facing employment barriers. The term 'barriers' includes individuals who have a physical disability, developmental disability, learning disability, behavioral concerns, infractions with the law, psychiatric illness, are recovering from drug or alcohol abuse, or have dropped out of school.

### **Dunfield Park Community Centre (DPCC – Now renamed WestRock Community Centre)**

The Community Centre's mission is to promote the health and social well being of families and the community in which they live, and to help develop a better social environment through recreational, educational, employment, health and social programs. They aim to create and maintain a safe, welcoming, nurturing environment which will encourage growth and support positive and socially acceptable interactions between children, parents, and older persons within the community.

### **Food Security Network of Newfoundland and Labrador (FSN)**

FSN is a provincial nonprofit organization founded in 1998 in response to growing concerns of hunger and poverty in the province. Since 1998, FSN has been at the forefront of fostering awareness, dialogue, and action around issues of food security, health, poverty, hunger, access to food, and the food system as a whole. FSN's mission is to actively promote comprehensive, community-based solutions to ensure physical and economic access to adequate and healthy food for all.

### **Gros Morne Cooperating Association (GMCA)**

The Gros Morne Co-operating Association is a not-for profit organization with volunteer members. The Gros Morne Co-operating

Association works with Gros Morne National Park to support and supplement the protection, preservation and interpretation of the park's heritage. The Co-op's products and services help visitors and residents to better understand the important natural and human history of the park area. The revenue it earns is used to enhance visitor activities, conservation programs at the park and market the region as a destination.

### **Labrador Friendship Centre (LFC)**

The LFC's mission statement is to provide the best possible services to the three major Aboriginal groups of Labrador through the provision and implementation of Social, Cultural, Health, Educational and Developmental Initiatives. This includes, but is not limited to; a Community Outreach Worker, Housing and Homelessness Initiative, Youth Centre, Aboriginal Family Centre, a number of Employment Generation related programs and many other value added services that are provided by staff and volunteers.

### **Office of Immigration and Multiculturalism (OIM)**

One goal of the pilot was to include a government program so as to be able to assess the applicability of the SROI methodology within a government setting. The Government of Newfoundland and Labrador elected to do their SROI on the work of the Office of Immigration and Multiculturalism, which is responsible for implementing the Provincial Immigration Strategy, Diversity – "Opportunity and Growth."

### **School Sports Newfoundland and Labrador (SSNL)**

School Sports Newfoundland & Labrador is the umbrella group for school sport activity in the province. Their core programs are divided between a competitive high school sports program and non-competitive participation-based

elementary and junior high programs. Their high school program includes an extensive 11-sport program offered through 250 annual tournaments. It is supported by Tournament Awards Program, Scholarship and Annual Awards Program, Sports Stars, Coaching in NL Schools and various publications and resource materials. Participation Nation is an elementary and junior high program which was initiated in response to the decline in physical activity levels in the junior high age group.

### **St. Anthony Basin Resources Inc. (SABRI)**

SABRI administers a 3000 metric tonne allocation of Northern Shrimp on behalf of the communities from Big Brook to Goose Cove. Their goal is to generate and expand the region's economic base and improved employment opportunities for its residents. In so doing, SABRI has become part owner of the St. Anthony Shrimp Plant and has invested significant funds into a variety of community development initiatives in the region.

### **Student Work and Service Program – Community Component (SWASP)**

The Community Service Component of the Student Work and Service Program (SWASP), administered by the Community Sector Council NL, enables students to work in their home community during the summer, develop transferable skills, explore career interests and help nonprofits carry out their programs. In return, students receive a \$1,400 tuition voucher upon completion of a 280-hour placement (8 weeks), plus a weekly stipend of \$175. This program operates with financial support from the Government of Canada, Service Canada. Voucher payments to post secondary institutions are administered by the Government of Newfoundland and Labrador.

## Methodology & Assessment Criteria

### Methodology

Based on direction from the SROI Project Guidance Committee (comprising funders, community organizations, and CSC) the Community Sector Council NL agreed to undertake the necessary monitoring and assessment for the Social Return on Investment Pilot Project.

When the proposal for the pilot was being developed it was agreed by all parties that this approach to assessment and monitoring would be used.

The CSC committed to undertake assessment and monitoring throughout the project. Senior Program Associate Darlene Scott, who (as someone otherwise uninvolved with the pilot project) provided an outside perspective as she gathered data from project participants.

The methods used to assess the project were:

- A group evaluation exercise at the project midpoint, facilitated by CSC CEO Penelope Rowe.
- An evaluative focus group with project participants at the project's final in-person meeting, led by CSC Senior Program Associate Darlene Scott.
- Key informant interviews with project participants, conducted by Darlene Scott.
- An online survey of project participants, conducted by CSC Project Associate Josh Smee and Darlene Scott.

### Assessment Criteria

The project was assessed based on the following criteria, all drawn from the initial project proposal

*“One of the conclusions we made was that we, as an organization, can work harder to collect more evidence that is valuable for us, that proves we’re doing a good job.”*

*- Project participant*

submitted to ACOA and the Government of Newfoundland and Labrador. (See next page)

### **The potential of the SROI process as an evaluation method. Key questions:**

Whether the SROI process resulted in evaluative information that is usable by the group with funders or other stakeholders; i.e., will those audiences understand the SROI results? Can SROI measurement be easily incorporated into future projects? Did SROI shift thinking away from outputs toward outcomes. Are there any fears that SROI will be viewed as self-serving or biased? Has SROI participation changed relationships with clients? Has SROI thinking permeated the organization?

### **The types of work and organizations best suited to SROI measurement and analysis. Key questions:**

Are there types of project that lend themselves to measurement? Can both short and long term projects be assessed? Challenges of applying SROI measurement across an entire organization – what would make it possible or what would deter a group from doing so? How important is support and leadership from an organization like CSC or nef?

### **The degree to which capacity was built within participant organizations. Key questions:**

Will measurement tools learned in SROI be embedded into future evaluations? Will they be

used again? Was SROI used as a professional development opportunity for staff or volunteers or could it be? Have participants gained skills in data management, research and report writing that are now available for sharing? Is there 'some' use of SROI tools as opposed to 'full' usage?

**The opportunity for SROI to show the value of investments in community groups, to clients and a wider community. Key questions:**

What are the plans for participants to publicize SROI results? Has a report been prepared for the participant group's AGM? Have SROI results been presented to funders? Does having a ratio strengthen or weaken the ability of a group to argue for funding? What issues need to be raised with funders to improve their understanding of SROI concepts? Is there evidence that an SROI assessment has enhanced efficiencies in any of the pilot groups? Have SROI results been (or will they be) incorporated into strategic planning?

**The satisfaction of participants with the project. Key questions:**

What were participants' overall impressions of:

- clarity of goals
- ease of understanding of SROI concepts
- access to CSC supports
- access to nef supports
- meetings and venues
- logistics and follow-up
- access to proxy data.

**The potential value of the SROI methodology for wider use as another tool for demonstrating value of programs. Key questions:**

How much ability and willingness is there in the pilot participants to be approached by other users? What potential exists for publishing results of the SROI pilot? Is there knowledge amongst funders of the principles of SROI? Has SROI

helped participants 'quantify' their deliverables with backup arguments?

**The implications for building a body of expertise in SROI analysis. Key questions:**

Do the combined results of the SROI process and assessment result in a 'toolkit' that can be shared, modified and applied to other groups? Is there faith in pilot participants that proxies are reasonable facsimiles of value in the sector and that a monetized value (ratio) reflects worth? Has a cohesive group of early adopters been realized in the province – are there people who could mentor others? Is there a recorded history of the process?

**Opportunity for CSC to expand delivery of SROI. Key questions:**

Does CSC know the willingness or ability of community groups to pay for the supports needed to conduct an SROI measurement, based on expressions of interest and attrition rate(s) in this pilot? Is the length of time required and effort needed to conduct an SROI assessment now known? Is this a paid staff or volunteer model (or does it matter)? Is an investment in SROI an efficient use of funds?

**Summary**

The SROI pilot project represented a significant allocation of resources towards exploring a tool that could become an important part of the toolkit for community organizations in coming years. The pilot involved applications of the SROI method in contexts that are new to Canada and uncommon globally: very small organizations, organizations who do not work directly with clients, and organizations in very small communities.

The goal of this assessment is to paint a realistic picture both of the context in which this work was done and the overall implications of the pilot participants' experiences. As an innovative initiative, there is a great deal to learn from both the successes and the challenges faced over the 15 months of the project. The succeeding sections of this report will address each assessment point in more detail.

## Project Satisfaction

Project participants felt a strong overall level of satisfaction with the project. Much of this was tied to the close relationships all the participants built with the consultants supporting the project, both at CSC and at nef. Josh, Natalie, and Jonathan all developed collegial and open relationships with the participants and the responsiveness of project staff to questions and requests was repeatedly and forcefully noted in all of the feedback received on the project.

The ability to meet face-to-face enhanced the satisfaction levels of many groups; there is an element of isolation when working through such a complex project at a distance; this was helped by the in-person sessions at the beginning, midpoint, and end.

There were elements of the project process that were less satisfying for participants. Chief amongst them was the time involved in accomplishing the work. The project model called for approximately 28 working days per group. In fact, the average time spent on the project was estimated by most to be slightly more than 50 working days, travel time excepted. This was a struggle for many organizations, especially since in all cases the people taking on the SROI work also had other roles. In several cases, one of the two participants from an organization was the executive director or CEO, and in two cases one of

*“SROI shows the value of what we actually do. We always evaluated programs, but never to this extent on the importance of what we do, and that is what we got the most from. We now know we are doing things the right way, this is a valid piece of research that shows we are actually doing something right.”*

- Project participant

the participants was a volunteer. In several interviews, participants expressed a feeling that they might have fallen “short of the mark” by being unable to devote the time necessary.

While the groups generally rated the communication aspect of the project very highly, the at-a-distance nature of much of the work was a significant contributor to the increased use of time. SROI involves a host of complex concepts, which are much more easily taught in person. To avoid similar time challenges in future projects, it would be advisable to work in a way that involved somewhat more in-person contact between trainer and participant.

Regardless of time challenges, satisfaction with the results was high, as these survey results show:

Measure of satisfaction	Group average (out of 5)
<b>We feel confident in our SROI results</b>	4.29
<b>We would be comfortable defending our SROI results publicly</b>	4.06
<b>We feel confident in the proxies used to develop our SROI models</b>	3.88

Participants also found individual elements of the training quite valuable. Many groups cited the experience of stakeholder engagement and the development of a theory of change based on that stakeholder feedback to be a transformative process for them. Other organizations felt that the chance to attach values to familiar outcomes was an extremely satisfying experience.

Overall satisfaction was, in fact, quite high across project elements, as the chart below shows:

Element	5 = Extremely Valuable
Initial SROI training (in-person) - How valuable was this phase to you?	4.80
Focus groups/interviews to develop your theory of change - How valuable was this phase to you?	4.56
Writing up your theory of change and impact map - How valuable was this phase to you?	4.44
Developing indicators (turning your theory of change into a questionnaire) - How valuable was this phase to you?	4.25
Gathering the data - How valuable was this phase to you?	4.13
Entering data into your model - How valuable was this phase to you?	4.06
Finding and agreeing on proxies for your outcomes - How valuable was this phase to you?	4.06
Writing up your results - How valuable was this phase to you?	4.13

Several participants in the pilot indicated satisfaction resulting from their awareness that they were pioneering an innovative form of

evaluation in their respective sub-sectors.

Participants also expressed satisfaction in having a strengthened ability to “make their case” both to funders and communities.

Given the challenging nature of the project, which involved a great deal of work and a whole range of unfamiliar skills supported largely through Skype sessions, phone calls, and emails, the level of satisfaction with this project is reassuring.

It is worth noting that there was a visible evolution for most of the participants’ satisfaction levels over the course of the project. At the first assessment meeting, held at the first in-person session, many participants were feeling quite nervous at the complexity of the work involved; at the assessment meeting at the midpoint, they were feeling challenged by the project’s workload, and had yet to see the results of their analysis.

Six months later, when participants were interviewed towards the end of the project, feelings had changed significantly; this trajectory continued as the participants completed the knitting together of the narrative aspects of their results, and had a chance to step back and review the results of their work. Overall, the participants in this project certainly felt that they had gotten their time and money’s worth.

## Capacity-Building

The SROI Pilot was conducted on a capacity-building model. This meant, in practice, that SROI experts at CSC and nef guided the participants through each stage of the process, but ensured that all the work – from conceptualization to implementation – was done by the participants themselves. It was a ‘hand-holding’ model in which the participants could count on detailed and responsive support from outside, but would not be able to have someone take the work on.

This model sets the Newfoundland and Labrador pilot somewhat apart from most other SROI efforts that have yet been undertaken in Canada, many of which have involved consultants in a much more active way. With a goal of this project being not only to produce SROI reports, but also to build in a set of skills to a variety of community organizations, there was an emphasis on training.

Results in this regard were mixed, in the sense that there was relatively little capacity built *outside* of the project participants themselves. At least at this early stage, it is difficult to tell whether or not there will be further dissemination within their organizations. At time of interview, very little such work had been taken on.

The project participants themselves, however, reported an extremely large amount of learning. They specifically referred to gaining a new appreciation for evidence-based inquiry, as well as a realization of how to fully consult their

Element	% change
<b>We are comfortable working with data in Excel</b>	12% stronger
<b>We are able to develop surveys, collect data, and analyze it</b>	12% stronger
<b>We are comfortable with academic research</b>	12% stronger

clients and how much value this could create for their organizations. Participants also reported

Element	Understanding of the concept (out of 5; group average)
<b>Focus groups/interviews to develop a theory of change</b>	<b>4.38</b>
<b>Writing up a theory of change and impact map</b>	<b>3.88</b>
<b>Developing indicators</b>	<b>3.75</b>
<b>Gathering data</b>	<b>4.50</b>
<b>Writing up results</b>	<b>3.75</b>

significant changes in their thinking regarding the ‘outputs/outcomes’ divide, with many now examining all their programs and activities with a critical eye and the question “So what?”

When surveyed at the end of the project, participants generally reported a solid command of the concepts and techniques they used:

Although command of individual skills was generally quite strong, most of the groups did not feel equipped to take on another SROI without support. Just under 20% reported that they would want to do so, while the rest would all require as much or more support than this project offered them. This is an important lesson; it is unlikely that SROI will become established as a methodology without experts in the field who can, at some level, provide support.

Some groups may want to pursue SROI without any capacity-building element at all; there is certainly potential for CSC take on all elements of an SROI for a client. This would, however, set aside many of the significant benefits of the capacity-building model.

## Using SROI to Show the Value of Investments in Community Groups

Every participant in the project indicated, in their interviews, that they saw significant value in outreach and publicity. At time of writing, their external engagement, or plan for it, looked like this:

	<b>We will present results to our board/ committees</b>	<b>We will take on SROI analyses of other projects in our organization</b>
<b>Already Done</b>	30%	0
<b>Definitely going to</b>	37.5%	25%
<b>Quite Likely</b>	6%	6%
	<b>We will share our results with partners and stakeholders</b>	<b>We will make our results public</b>
<b>Already Done</b>	12%	0
<b>Definitely going to</b>	25%	12%
<b>Quite Likely</b>	25%	25%
	<b>We will promote SROI to other organizations in our field</b>	<b>We will encourage other organizations to take on SROI</b>
<b>Already Done</b>	12%	6%
<b>Definitely going to</b>	18%	12%
<b>Quite Likely</b>	25%	25%
	<b>If SROI were an evaluation option coming from a funder, we would choose it</b>	
<b>Already Done</b>	6%	
<b>Definitely going to</b>	25%	
<b>Quite Likely</b>	25%	

Note that one group has already accepted another SROI project, and a full half of respondents indicated that they thought it likely they would do so. Participants were also enthusiastic about promoting SROI within their field, especially where opportunities exist for similar organizations to apply or adapt models developed in the project.

Participants expressed a belief that the promotion of SROI was a responsibility of their boards of directors, rather than of staff. They expressed some concern that, with knowledge of the SROI methodology relatively limited amongst their funders, they would have to spend a large amount of time explaining the SROI process when seeking to use their results.

At a broader level, the pilot had a strong effect on how participants felt about their ability to tell their story and demonstrate the value of their work, as shown on the chart below:

Element	% change due to pilot
<b>We know what the outcomes of our work are for our stakeholders</b>	<b>24% increase</b>
<b>We understand how outcomes are created</b>	<b>30% increase</b>
<b>We have a good sense of what our clients think of our work</b>	<b>17% increase</b>
<b>We can "tell the story" of our organization effectively</b>	<b>20% increase</b>
<b>We feel that we can demonstrate the value of our work</b>	<b>15% increase</b>
<b>We are able to manage change</b>	<b>14% increase</b>

The types of outcomes identified by project participants were wide-ranging, but in every single case the value of the social and environmental outcomes was greater than that of the direct economic impact. Participants were very happy to be able to tell this aspect of their story in a structured way.

## Types of Work Suited to SROI

Organizations in this pilot established that the method is flexible enough to be applied to a wide variety of contexts and working types. With enough time spent pushing stakeholders for outcomes and pushing research for proxies, it is possible to build models based largely on the well-being impacts programs had on their individual beneficiaries – the people being served, at some point, by every community organization. The innovative work done by project participants will likely be useful to many other organizations.

One of the distinctive aspects of the Newfoundland and Labrador SROI Pilot was the diversity of projects being studied. This was very much a conscious choice during the selection process, since one of the goals of the project was to assess how viable SROI would be across different types of work.

Conventional wisdom about SROI (and, to some extent, existing practice) would hold that it is most applicable for organizations that work directly with clients, rather than organizations that work through intermediaries. Existing SROI analyses in Canada have largely focused on social services and poverty reduction. There is some reason for this; in the social-services world, finding financial proxies is made much easier by the numerous publicly available methods of quantifying avoided costs for the justice and health systems. A number of participants in this pilot identified outcomes like this – WestRock Community Centre, for example, was able to value the number of avoided interactions with the justice system.

There are, however, some challenges to this approach. As noted on earlier in this report, there have been some questions raised about avoided costs as proxies, since they don't always translate

*“Overall SROI is best suited for longer term projects because it is ideal to be able to reflect on change. But SROI, we have learned, is adaptive and flexible and there are many ways to use the methodology. Many SROI concepts can easily be applied to a short term projects and obtain results.”*

*- Project Participant*

to real savings. More to the point, these types of measurement don't value the outcome *for the individual* in an exact way. The participants in this pilot recognized that, and broke some very significant ground in applying proxies that directly described the value of personal well-being. This is a major step for SROI practice, and it was applied across almost every participant – regardless of the type of work they were doing. Avoided-cost measurements were used largely to capture value *to the state*, where they sit on much more stable methodological foundations. In their interviews, pilot participants expressed a general consensus that the SROI approach was best used on a single-project basis, rather than to evaluate organization-wide. They made the valid point that outcomes can be more clearly defined and aligned within a specific project, whereas at an organization level, the potential range of outcomes is much wider, making comparison of results more of a challenge.

That said, those groups who did look at the work of their whole organization generally identified a common set of outcomes; for most organizations that work within a specific mission, this shouldn't be an insurmountable challenge. The most salient example of this in the pilot group was the Community Education Network, which applied a

common outcomes framework to three of its core programs. The Food Security Network also used a similar approach to identify the outcomes common to its interactions with other groups – although valuing these outcomes was based on a widely varying set of impacts at the beneficiary level.

As such, one result of this pilot project was to develop several possible models for the seemingly challenging enterprise of evaluating an entire organization's work.

Participants also recommended that the SROI approach be applied to projects with long-term goals and objectives, so as to allow change over time ('distance travelled') to be measured. There was consensus that short-term projects do not allow clients to comment fully on outcomes or for service providers to confidently connect outcomes to their interventions alone. In a number of cases in this pilot, participants had access in their data collection to groups of clients who had passed through the program some time ago, providing time for reflection on the implications of the program in their lives. By and large, the solution to this challenge probably lies in the stakeholder engagement element of SROI; all the organizations in the pilot built models based only on what their stakeholders told them made sense. Regular check-ins with succeeding cohorts of service users is critical.

Looking at organizational capacity rather than type, some respondents felt that SROI would best be undertaken by organizations with an existing research capacity. Learning how to properly design and administer focus groups, surveys, and questionnaires was a major use of project time for many participants (but also one of the skill sets that was learned most thoroughly). This was especially true when the staff members or

volunteers assigned to the project had no research background.

There were a few suggestions that projects could go through some kind of assessment process to gauge the applicability of SROI to their work. In fact, though, the story of this project is that SROI can, in general, be made to fit almost any type of project – but that in so doing it may commit the organization to a significantly larger workload. CEN and FSN are clear examples here; both essentially conducted several concurrent SROI projects to generate the results they were looking for.

Participants did feel that SROI was not equally suited to all types of work, in that it is more suited to projects that deliver strong social outcomes. To an extent, this is true, in that SROI's focus on the end beneficiary makes it ill-suited to claiming large and diffuse economic benefits; for an economic benefit to be claimed on an SROI balance sheet, it generally needs to be traced all the way to whoever ends up with additional money in their pocket. This can be beyond the scope of a simple SROI analysis, and so in some cases the economic benefits may have been understated. Some participants, though, did some innovative work to get around this challenge. In Gros Morne Cooperating Association's case, for example, they were able to use a wealth of pre-existing studies to capture the economic impact of their work.

Overall, the question of what organizations are most suited to SROI has a complex answer. It is certainly true that SROI is *easier* for organizations that work directly with clients. It is also easier for organizations that produce immediate and obvious changes to clients' lifestyles.

## Building a body of SROI Expertise

One of the goals of the SROI pilot project was, in effect, to lay the foundations for a community of SROI practice in Newfoundland and Labrador. The results of the pilot do provide some strong guidance as to how such a community of practice should be shaped.

CSC Project Associate Josh Smee has now been trained in SROI sufficiently to deliver most of the support groups might need to develop and implement SROI techniques. For the immediate future, there will still likely be a role for external organizations such as nef, at least until Mr. Smee is formally accredited to deliver the SROI training course that grounds participants in the method.

Relatively few of the organizations in the pilot emerged fully confident in their ability to take on an SROI on their own or with minimal support – though one group has indeed already embarked on another SROI, while two participating groups did feel equipped (assuming access to staff time) to take on such an analysis. Most participants felt that they had emerged from the project with a

*“For now, we think we have a ‘relatively good grip’ on SROI concepts but we’d still need support and verification – someone to say, ‘yes, you are right and the next step is’....sort of thing. We still require guidance. We feel that every time we would do an SROI we would learn new things and new concepts – we would use some concepts, but not all of them.”*

*- Project participant*

*“Doing an SROI was easier than hiring an external consultant because we know our organization, and our clients, best and we saved the time of having to explain our operations to an external agent – we did not have to do that teaching.”*

*- Project participant*

strong set of results, and a strong appreciation for what SROI involves, but not with a fully developed SROI ‘toolkit.’

In most cases, participants indicated that they would be reluctant to take on the job of mentoring other organizations in the SROI method; there was a strong sense that there was need for an expert organization to provide this sort of support – and several organizations made it clear that, for them, future SROI work, if it were to happen, would need to be based around hiring an external consultant to take on more of the process.

Within the participant group itself, there was some sense of cohesion, but most participants felt that their programs were unique and felt relatively little connection to the other participants in the project. Only one respondent indicated that they would call another pilot participant group to bounce ideas around for future SROI-related work. The lesson here is likely that future SROI work, if taken on in a group setting, would benefit being done with a smaller, more related group of organizations. Geography also played a role; as effective as telephone conferences and Skype calls are, there is no substitute for in-person interaction.

The participants responding to CSC’s survey were quite clear that organizations would need between ‘some’ (3) and ‘lots’ (4) of support to undertake SROI work.

Element of SROI	Amount of support needed (out of 5)
Initial SROI training (in-person)	3.61
Focus groups/interviews to develop theory of change	3.44
Writing up theory of change and impact map	3.75
Developing indicators (turning theory of change into a questionnaire)	3.69
Gathering the data	3.00
Entering data into model	3.5
Finding and agreeing on proxies for outcomes	3.81
Writing up results	3.06

When asked what model they would be interested in if undertaking another SROI project, 75% of respondents indicated they would want a capacity-building model similar to the pilot project. Another 12.5% wanted minimal support, while the final 12.5% would want someone to take the whole project on for them. When asked to recommend a model for others, responses were split, with 43.75% recommending a slightly more intensive level of support than in the pilot, and another 37.5% recommending the capacity building model and 18.5% recommending that organizations contract out the work.

If SROI is to become widely established in Newfoundland and Labrador or Canada, expert support is necessary. The experiences of the pilot project make this quite clear. That said, it was also clear that the most challenging aspect of the SROI process was attaching valuations to outcomes

using proxies. This is the place that SROI departs most sharply from other evaluation methods. The other elements of the SROI process (intensive stakeholder engagement, building a logic model, measuring outcomes and change) are easier for community organizations to comprehend quickly.

This suggests a model for further developing a body of SROI expertise: providing the training for groups to learn how to effectively engage with their clients and translate their engagement into a theory of change. With the experiences of this pilot as a guide, it should be possible to train groups to attach indicators to the outcomes they identify, and to go out and gather data on them. These skill sets were well-established in most of the project participants.

The obvious place for more expert intervention in the SROI process is in helping organizations value the change that they measure – and indeed, providing common resources to do so is the direction in which the broader SROI field seems to be evolving. Shared proxy banks, software packages, and streamlined processes are in development in several places; CSC has been in contact, for example, with Social Asset Measurement (SAM) a consultancy with a contract to develop a software package that automatically rates proxies and attaches them to outcomes. Smoothing this process out will remove a significant amount of the most challenging elements of the SROI process.

The work of the SROI pilot has already laid some foundations for this to happen. The CSC has collected a set of proxies that organizations working in Newfoundland and Labrador felt were appropriate to their work – but a number of them should also be applicable on a Canadian, or even an international level. In a number of cases, CSC and nef facilitated the sharing of proxies between participants; almost every SROI analysis

completed in the project uses at least one proxy that is shared with another participant. In a number of cases, it was research done by a participant group that provided a critical insight to another group when passed along. This connection process, when it happened, was usually facilitated by CSC or nef. More passive methods were not as successful. Spreadsheets put online to allow groups to share proxies, for example, were not used. At a later date, building a body of SROI expertise may mean establishing easy access to such tools, but for the moment it means establishing access to *people*.

## Potential for Wider Use

CSC questioned all respondents on their overall assessment of SROI as an evaluation method, specifically regarding its relationship to other systems with which they were familiar. The results are presented in the table below.

1 (Much worse) to 5 (Much better)	
<b>"Fit" of results/report to your experiences on the ground - Was SROI better or worse?</b>	3.80
<b>Ability to discern strengths/weaknesses in your programs - Was SROI better or worse?</b>	3.62
<b>Engagement of clients and other stakeholders - Was SROI better or worse?</b>	4
<b>Usefulness of the report for your own planning - Was SROI better or worse?</b>	4
<b>Work required to complete the evaluation - Was SROI better or worse?</b>	2.42

Overall, participant groups were satisfied with SROI as a process, although all of them noted that it took up significantly more time than they had planned. They felt confident in their results, and agreed that they would be of use in conversations with existing and potential funders. Importantly, almost every participant said that the SROI process had positive impacts on their relationships with their clients – and several groups had already started to shift some of their day-to-day procedures based on the learning from their SROI work.

All the participants produced results that were far more detailed than any they had done before – and indeed, most participants will still be mining

their data sets for interesting conclusions for some time after the project is complete. There was a unanimous agreement that an SROI approach was the most exhaustive evaluation process that they were familiar with, particularly due to the demand that participants examine their work from multiple perspectives and push their stakeholders to identify well-being outcomes.

All participants raised the issue of the large time commitment required to complete a rigorous SROI. This is also a major element of the broader sectoral conversation about SROI's place in evaluation toolkits. Participants made it clear that future SROI participants should be forewarned about the intensity of the work. Several reported taking personal time to complete the project, due to a feeling of personal commitment to project completion.

It's worth asking whether this is necessary. Could SROI be done in a shorter timeframe, or with less effort? There are certainly organizations offering SROI analysis on a shorter timeframe. The challenge, though, emerges in the results. Most of the methodological challenges outlined earlier in this report have a common solution: the type of intensive analysis taken on by the groups in the pilot. Is there a space for simplified SROI analyses? Quite possibly. Capturing and valuing only a few outcomes (rather than a comprehensive account of them) may be worthwhile. There is also clearly space for the individual elements of the SROI process to be broken out as separate exercises.

Overall, though, much of the truly innovative work in this pilot can be traced back to these investments in time and effort. There is definite potential for this to get easier as proxies become more commonly available, and there is definitely an argument to be made for compressing the SROI work across a shorter timeframe to allow for

*"SROI gets you to look at change in a different way. "*

*"It made us look differently at the way our program was designed"*

*- Project participants*

more focused work. It would also generally be advisable for Executive Directors to delegate, if possible, to other staff.

Moving beyond time challenges, what about the reliability and utility of the method itself? There is a common concern with many evaluation methods (including SROI) around bias. Project participants felt strongly that they had avoided bias, almost entirely due to the presence of CSC and nef staff in the process. Both CSC and nef questioned, analyzed, and re-thought participants' conclusions. Consistent with the seven principles of SROI, external review proved essential.

As a result, participants felt quite strongly that some amount of expert support would be needed for others to take on SROI analysis in the future. In some cases, participants felt that SROI is best-served by having a full-time staffer to take the project on, since staff was often challenged juggling SROI work with other tasks.

Several participants indicated that the component parts of the SROI process would be integrated into future client services and program evaluations. These included the methods associated with asking clients for input, satisfaction questionnaires, and new ways of looking at outcomes instead of outputs.

Many participants in the project noted the need for public explanation of SROI concepts. The people who will be reading SROI reports – whether board members, the public, or funders – need to be able to understand them. An SROI study involves some quite sophisticated work, which can be overshadowed by the headline-grabbing SROI ratio. To avoid this, there needs to be storytelling, not just about organizations, but also about the process they used to understand their own story. The training sessions organized for government personnel during the SROI pilot are a good example of the type of outreach participants felt was necessary to build awareness of the SROI method outside of the pilot group and their immediate colleagues.

Participants saw this largely as a role for CSC, as well as for their own boards. CSC has already made conference presentations on the SROI method; with the conclusions of this pilot project laid out, there will clearly be a space for more dialogue on SROI’s place in the nonprofit landscape.

The adoption of SROI in a wider way will also hinge on some larger-scale trends. It is already being used as an evaluation option for certain federal funding contracts and indeed one project participant group has agreed to take on an SROI in this way. The degree to which SROI becomes accepted as a tool within government and within major funders will have a strong influence on the wider use of the methodology. The degree to which some of the measurement elements are standardized also matters. At SROI’s current stage of development, many of the methods of well-being measurement are still evolving. Well-being economics, as a field, is a relatively young discipline, and as research develops, so will the opportunities for wider agreement on standard values for certain outcomes.

*“SROI is a good method for the type of work we do in the nonprofit sector where we are trying to measure more intangible things than things you can put your hands on and count.”*

*- Project participant*

With access to help from experts at a few critical junctures, SROI becomes a feasible addition to the nonprofit toolkit. It will never be suitable for every organization – but for those who do take it on, it can deliver an unparalleled level of detail about the ways they create value, and how those sources of value weigh up against each other. Most importantly, every pilot participant was, at some point, surprised by what their SROI analysis showed them. Learning new ways of making a difference is at the core of SROI practice, and participants in the SROI pilot got there.

## Opportunities for CSC to Expand Delivery of SROI

There was a strong sense that the further development of SROI would depend on having access to expert advice and review at critical points in the process, especially when it reached the research and valuation stage. Many participants hope that CSC takes on this role.

The capacity is there. CSC is now able to take on every stage of an SROI analysis, and plans to pursue accreditation for staff from the SROI Network, the global standards body for the SROI Method. This will allow CSC access to a global network of support, and allow CSC to deliver the SROI training course. Accreditations aside, feedback from project participants on CSC’s

capacity to provide SROI support was very positive. Several participants noted that they were surprised at the extent to which CSC was directly involved in the analytical aspects of the project – they had assumed that this work would accrue to the nef consultants, with CSC organizing logistics. At the earliest stages of the project, this was largely true – but by the project midpoint, CSC was able to pick up much SROI support work.

For the immediate future, further delivery of SROI training in Canada by CSC would likely be done in partnership with a consulting organization; SROI Network accreditation is necessary to deliver the formal SROI training course that begins most SROI projects. Once the CSC has an accredited staff member, there will no longer be any formal reason to contract external consultants, but there is always a possibility of involving them in a review capacity.

There are several ways in which CSC may expand SROI work. One that has emerged through conversations with pilot participants is to use the work already done to benefit their partner organizations elsewhere. This has wide applicability, not just within the partner group, as there is significant potential for economies of scale for organizations delivering similar programs (or pursuing similar outcomes) in multiple places.

Organizations that have completed one SROI may also want to pursue further analyses so as to be able to compare programs internally. For organizations using multiple programs to pursue a common set of outcomes, this is a chance to learn which programs are most effective at delivering them – a powerful, and until now a very challenging piece of information to access. Several project participants indicated further SROI work within their organizations is likely.

What will CSC-delivered SROI work look like? There are several possibilities, largely dependent

*“When we doubted ourselves, we consulted (nef and CSC) and the process has validity. We are confident in the proxies and our results.”*

*- Project participant*

on the availability of funding. Group projects such as this one are, by far, the most cost-efficient way of accessing SROI training. Groups paid \$4000 each to participate, which was, of course, made possible by the contributions of ACOA and the Government of Newfoundland and Labrador.

Even with their contributions included, this project was quite inexpensive measured against the cost of hiring consultants on a one-to-one basis. With travel and venue costs removed, the per-group cost of this project was approximately \$12,500; this compares to an estimated \$20,000-\$40,000 to hire a consultant one-on-one.

There may be possibilities in the future for future group SROI projects running on a similar model. This would largely depend on the existence of funds set aside in project budgets for evaluation – and whether such funds could be used to participate in a group project.

The alternative model will be for CSC to deliver training on an individual or small-group basis, matching the project plans to the needs and capacities of client organizations. This model has the advantage of being more adaptable to varying levels of organizational capacity and access to resources than a group project would be. There appears to be a significant appetite in Canada for this type of work; with some very innovative SROI projects completed as part of the SROI Pilot, CSC is well-placed to provide leadership. Market research may be the next logical step.

Regardless of the model, there are a number of lessons from this pilot that CSC could incorporate into future SROI training efforts:

- **The value of structure and deadlines.** CSC training would strengthen the emphasis on project goals and sub-goals, which provided a great deal of motivation to participants in the pilot.
- **Timelines:** CSC training would likely operate on a somewhat tighter timeline than this pilot. Shorter gaps between “check-in” points will help keep participants on track and avoid time lost to dead ends in research or model-building.
- **Ample in-person contact.** The in-person sessions during the pilot proved to be essential elements. CSC-led SROI training would include slightly more working sessions engaging CSC staff and clients.
- **Proxy-sharing:** the proxies developed during the SROI pilot will be retained and added to. Each succeeding SROI project will make the next one easier to accomplish as a proxy bank develops, and there will be a chance to share with proxies developed by other Canadian SROI efforts.
- **Program timeline integration:** having a chance to administer before-and-after surveys grounded in SROI methodology makes tracking change much simpler. Where possible, CSC training will match schedules with client organizations so that they are prepared to enter the data collection phase as a program cycle begins, and to end it when the cycle ends.
- **Detail:** although SROI analysis as done in the pilot was labour-intensive, the level of

attention to things like deadweight and attribution was very important.

There is also potential for CSC to engage with the evolving community practitioners and the organizations interested in the development of the methodology. This could entail building partnerships to share best practices and innovations from the Newfoundland and Labrador Pilot, as well as coordinating efforts to build awareness of SROI in Canada.

Overall, the pilot project’s goal of building local capacity for SROI delivery has been well-accomplished.

*“It was a huge capacity builder for our organization. All of the other staff were kept abreast of what we three were doing and SROI allowed us to develop a questionnaire process on what we could all do in the future.”*

*- Project participant*

## Conclusions

The 12 community organizations and one government program who participated in the SROI Pilot Project are all pioneers.

“Demonstrating Value” pushed boundaries in a number of ways:

- It brought SROI to what are, in a global context, very small organizations. Participant organizations had as few as two employees. Many of the organizations engaged their executive directors/CEOs directly in the SROI work, and it got done.
- It used SROI to value a wide variety of programs by rooting them in client well-being. The interventions studied in this pilot ranged from administrative support to farmers’ markets, to the construction of a fish plant, to the provision of job coaches for disabled clients. In all of these disparate cases, SROI was used effectively to capture angles not captured or considered before.
- It developed several ways of valuing community and sense of place. Community organizations are often the linchpins of smaller communities in Newfoundland and Labrador; pilot participants developed several ways for them to say that the sense of connection to the community that they build is worth something. In fact, it’s worth a lot.
- It was adaptable. No two organizations pursued the exact same set of outcomes or went about their work in the same way. It brought together government and community organizations as equals, and they learned from each other.

The participants in this project have all learned a new way to tell their story that should pay off. It is also worth noting the degree to which organizations were able to take on a whole host of unfamiliar tasks, from mapping their impacts on a

flow chart, to running focus groups, to parsing economics literature. This is no small achievement for staff and volunteers with other jobs to do.

Before closing this report, it’s worth reviewing the deliverables laid out in the initial proposal:

Deliverable	Status
<b>An SROI Report for each participant that describes in detail and offers empirical support to a model of how that organization makes an impact on the communities and stakeholders around them.</b>	Largely complete. Reports have taken various forms, from short summaries to in-depth reports. At time of writing, one report remains unfinished due to survey delays.
<b>Two employees or volunteers from each participant organization trained in the SROI methodology through in-person training and remote support from SROI specialists at nef.</b>	Complete. In some cases more than two; several organizations involved a third person. There is evidence of internal and external skill-sharing.
<b>A comprehensive list of the people and organizations impacted by each organization’s work.</b>	Complete – built during the planning phase early in the project.
<b>A list, for each group, of locally applicable proxies</b>	Complete and saved for future use.
<b>SROI ratios that describe the total value created for every dollar of support (in cash and in kind )the participant organizations receive.</b>	Complete. Interestingly, the amount of emphasis placed on the ratio varies greatly across the project group.
<b>An assessment of the value, merit and applicability of social return on investment analysis in Newfoundland and Labrador.</b>	Complete, in this report.

SROI has proven to be a powerful and adaptable tool for organizations to tell their stories. Expect to see more of it in the near future.

## Appendix A: Assessment Interview questions

### Areas of Inquiry Expanded (with prompts)

#### 1. The potential of the SROI process as an evaluation method.

**Query:** Whether the SROI process resulted in evaluative information that is usable by the group with funders or other stakeholders; i.e., will those audiences understand the SROI results? Can SROI measurement be easily incorporated into future projects? Did SROI shift thinking away from ‘outputs’ toward ‘outcomes’. Are there any fears that SROI will be viewed as self-serving or biased? Has SROI participation changed (strengthened) relationships with clients? Has SROI thinking permeated the organization (spread across staff, volunteers, board)?

**Quantify:**

- (Rate) degree of difficulty in locating and developing proxies
- Proxies fully developed?
- Rate SROI vis a vis former external evaluation processes (biased? easier? more or less user friendly? More or less costly?)
- (Rate) are organizations better able to manage change as a result of participation in SROI?
- Degree (rate this) of integrating SROI principles into programs

#### 2. The types of work and organizations best suited to SROI measurement and analysis.

**Query:** Can both short and long term projects be assessed? Challenges of applying SROI measurement across an entire organization – what would make it possible or what would deter a group from doing so? Is the relationship with CSC or nef or a like helper organization a deal-breaker (i.e., does having that relationship make it do-able?).

**Quantify:**

- Project-Based or Organization-wide?
- Paid to participate or subsidized to take part?
- Number of hours spent on the process.
- Percentage of time spent with CSC/nef support persons.

**3. The degree to which capacity was built within participant organizations while taking part.**

**Query:** Will measurement tools learned in SROI be embedded into future evaluations? Will they be used again? Was SROI used as a professional development opportunity for staff or volunteers or could it be? Have participants gained skills in data management, research and report writing that are now available for sharing? Is there 'some' use of SROI tools as opposed to 'full' usage?

**Quantify:**

- Number of staff and or volunteers with new SROI skills
- Rank the likelihood of re-using an SROI approach (or even applying to use it in a funded process)
- Give 'before and after' examples of changed practices (be concrete).

**4. Opportunity for SROI to show the value of investments in community groups, to clients and a wider community.**

**Query:** What are the plans for participants to publicize SROI results? Has a report been prepared for the participant group's AGM? SROI results presented to funders? Does having a ratio strengthen or weaken the ability of a group to argue for funding? (i.e., is the ratio defensible?) What issues need to be raised with funders to improve their understanding of SROI concepts? Is there evidence that an SROI assessment has enhanced efficiencies in any of the pilot groups? Have SROI results been (or will they be) incorporated into strategic planning?

**5. Satisfaction of participants with the project.**

**Query:** Overall impression of (1) clarity of goals (2) ease of understanding SROI concepts (3) access to CSC supports (4) access to nef supports (5) meeting purposes and venue issues (6) logistics on mous and follow-up (7) access to proxy information

**Quantify:**

- Before and after understanding of SROI Concepts
- Timeliness of CSC interventions
- Rate time commitments (in terms of expected vis a vis actual)
- Overall rating of satisfaction

**6. Potential value of the SROI methodology for wider use as another tool for demonstrating value of programs.**

**Query:** Ability and willingness of pilot participants to be approached by other users. Potential for publishing results of the SROI pilot. Knowledge amongst funders of the principles of SROI? Has SROI helped participants ‘quantify’ their deliverables (a key requirement of funders) with backup arguments; i.e., does it validly ‘measure’ what happened as a result of funded projects?

**Quantify:**

- (Rate) ability to incorporate SROI principles or practices into other forms of evaluation
- (Rate) ability of an SROI process to adequately measure success or failure
- (Rate) ability of pilot participant to ‘defend SROI (i.e., publicly)

**7. Implications for building a body of expertise in SROI analysis.**

**Query:** Do the combined results of the SROI process and assessment result in a ‘toolkit’ that can be shared, modified and applied to other groups? Is there faith in pilot participants that proxies are reasonable facsimiles of value in the sector and that a monetized value (ratio) reflects worth? Has a cohesive group of early adopters been realized in the province – are there persons who could mentor others? Is there a recorded history of the process which can be used effectively by others? Can groups take on an SROI with minimal external support?

**8. Opportunity for CSC to expand delivery of SROI**

**Query:** Does CSC know the willingness or ability of community groups to pay for the supports needed to conduct an SROI measurement, based on expressions of interest and attrition rate(s) in this pilot? Do we now know the length of time required and effort needed to conduct an SROI assessment? Is this a paid staff or volunteer model (or does it matter)? Is an investment in SROI an efficient use of evaluation funds?

## Appendix B: Assessment Survey Questions

**SROI: Pilot Project Closing Survey**

Hello SROI Piloters!

Along with the extensive interviews conducted by the CSC's Darlene Scott, we'd like to gather some more quantitative data to fill in our final report on this project.

We'd also like your expert guidance on how SROI support could be delivered in the future.

Since experiences of different participants may have differed, we'd ask that each participant from your organization fill out this survey separately.

Thanks!  
Josh & Darlene

First, we want to get some detail on your experiences

**\*1. Please let us know who you are**

Your name:

Organization name:

**\*2. As you'll recall, the original length estimate was for 28 days of work, spread across 2 participants per organization. We want to get a sense of how your actual working time fit with this, and how much of that was travel time or other administrative time.**

How many days did you yourself spend working on the project (in total)

How many working days did others in your organization spend on it?

How many travel days were involved for you?

How many travel days were involved for others in your organization?

**\*3. What share of the SROI support you received would you say came from the CSC? What share came from nef?**

	% from CSC	% from nef
Share of support	<input type="text"/>	<input type="text"/>

Any comments?

### SROI: Pilot Project Closing Survey

**\*4. Since this is an SROI project survey, we of course need to do some distance-travelled questions! These relate to some of the broad objectives of the project that CSC wants to assess.**

**Please answer on a scale of 1 (completely untrue) to 5 (completely true)**

	Before the SROI Pilot began, this statement was:	This statement now is...	If we had never joined the pilot project, I think this statement would be...
We know what the outcomes of our work are for our stakeholders	<input type="text"/>	<input type="text"/>	<input type="text"/>
We understand how outcomes are created	<input type="text"/>	<input type="text"/>	<input type="text"/>
We have a good sense of what our clients think of our work	<input type="text"/>	<input type="text"/>	<input type="text"/>
We can "tell the story" of our organization effectively	<input type="text"/>	<input type="text"/>	<input type="text"/>
We are able to develop surveys, collect data, and analyze it	<input type="text"/>	<input type="text"/>	<input type="text"/>
We are comfortable with academic research	<input type="text"/>	<input type="text"/>	<input type="text"/>
We are comfortable working with data in Excel	<input type="text"/>	<input type="text"/>	<input type="text"/>
We feel that we can demonstrate the value of our work	<input type="text"/>	<input type="text"/>	<input type="text"/>
We are able to manage change	<input type="text"/>	<input type="text"/>	<input type="text"/>

**5. Do you feel like your SROI work changed your relationship to your clients in any way? If so, how?**

## SROI: Pilot Project Closing Survey

**\*6. Now we'd like to get detail on how the project has played out for you. Once again, answer on a scale from 1 (Completely Untrue) to 5 (Completely True)**

This statement is:

We feel confident in our SROI results	<input type="text"/>
We would be comfortable defending our SROI results publicly	<input type="text"/>
We feel confident in the proxies we used to develop our SROI ratios	<input type="text"/>
SROI concepts are well understood within our organization	<input type="text"/>
We plan to integrate SROI into our existing survey/evaluation methods	<input type="text"/>

Any comments?

**\*7. Many of you have gone through program evaluations before - how did SROI compare?**

Was SROI better or worse?

"Fit" of results/report to your experiences on the ground	<input type="text"/>
Ability to discern strengths/weaknesses in your programs	<input type="text"/>
Engagement of clients and other stakeholders	<input type="text"/>
Usefulness of the report for your own planning	<input type="text"/>
Work required to complete the evaluation	<input type="text"/>

Were there any particular strengths or weaknesses of SROI? Anything especially unique?

## Section 2: Future Plans and Suggestions for Others

In this section, we'd like to get a sense both of what you think you might do in the future, and what you would suggest for other organizations considering SROI work. This will be very helpful to CSC going forward.

### SROI: Pilot Project Closing Survey

**\*8. First, we'd like to know a bit about your future plans on a scale of 1 (Definitely not) to 5 (Definitely)**

On a scale of 1-5 this is:

We will present results to our board (or appropriate committees)	<input type="text"/>
We will take on SROI analyses of other projects in our organization	<input type="text"/>
We will share our results with partners and stakeholders	<input type="text"/>
We will make our results public	<input type="text"/>
We will promote SROI to other organizations in our field	<input type="text"/>
We will encourage other organizations to take on SROI work	<input type="text"/>
If SROI were an evaluation option coming from a funder, we would choose it	<input type="text"/>

Any comments?

### SROI: Pilot Project Closing Survey

**\*9. Now we want to get a sense of which parts of the work require the most support, and which mattered the most to you when you did your work**

	How valuable was this phase to you?	How much support should be provided to an organization through this phase?	How comfortable are you with this kind of work now?
Initial SROI training (in-person)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Focus groups/interviews to develop your theory of change	<input type="text"/>	<input type="text"/>	<input type="text"/>
Writing up your theory of change and impact map	<input type="text"/>	<input type="text"/>	<input type="text"/>
Developing indicators (turning your theory of change into a questionnaire)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Gathering the data	<input type="text"/>	<input type="text"/>	<input type="text"/>
Entering data into your model	<input type="text"/>	<input type="text"/>	<input type="text"/>
Finding and agreeing on proxies for your outcomes	<input type="text"/>	<input type="text"/>	<input type="text"/>
Writing up your results	<input type="text"/>	<input type="text"/>	<input type="text"/>

Any comments?

**\*10. If you were to take on another piece of SROI work, what type of support would you need?**

No support at all - we could do it ourselves

Minimal support - someone to check over our results and reports

Capacity-building support - similar to this pilot project; assistance with method, with the community organization doing most of the work

Intensive support - Consultants developing questionnaires/proxies/models, with data collection and focus group work left to the community organization

Full support - we would want to pay someone to do all of the work

Don't know

Other (please specify)

### SROI: Pilot Project Closing Survey

**\*11. Which model would you recommend to other organizations interested in SROI?**

- No support at all
- Minimal support - someone to check over results and reports
- Capacity-building support - similar to the pilot project; assistance with method, with the community organization doing most of the work
- Intensive support - Consultants developing questionnaires/proxies/models, with data collection and focus group work left to the community organization
- Full support - paying someone to do all of the work
- We wouldn't recommend it at all
- Don't know

Other (please specify)

**12. Any other comments on the project overall?**