

Social Return on Investment Report 2012

**Work Related Learning Programme run by
Action For Kids Charitable Trust**

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Executive Summary

This is a Social Return on Investment report on a work experience and training programme for disabled young people taking place at the offices of disability charity Action For Kids in London. It analyses the social benefit generated by this Work Related Learning programme, delivered through the funding investment in Action For Kids Charitable Trust.

The report demonstrates that the Work Related Learning (WRL) term-time programme is making a real difference to both the regular and two-week placement students on the programme and their families, as well as benefiting 3 former students now employed by the charity, and continuing to benefit previous students now employed elsewhere. The report also shows that this is being done in a cost effective way that benefits its stakeholders as well as society as a whole.

The analysis shows that social value is generated when our stakeholders gain in skills, confidence and independence for an investment of £750,218.

This report demonstrates that for the analysed period, for every £1 invested in the WRL programme, £5.47 is returned in social added value. The Social Return on Investment report continues to provide a strong case for investment by funders in the WRL programme.

Section 1 - Introduction and background

Social Return On Investment (SROI) is a measurement approach that helps organisations to understand and place a value on the social value they are creating. This approach accredits social outcomes with financial values using proxies in order to represent the wider value of an organisation's work.

It was decided to measure two aspects of one of the programmes run by disability charity Action For Kids. The charity does not simply raise money but helps people in less tangible ways such as improving wellbeing and happiness. Action For Kids would like to measure these important intangible benefits and communicate them to supporters, funders and beneficiaries. There are two more reasons for performing the SROI. Firstly an SROI report can help an organisation to make hard decisions about how to allocate resources. Secondly, potential funders are starting to ask to see SROI ratios as part of pitches for funding.

In 2009 it was decided to perform an SROI evaluation of an area of the charity's work – the Work Related Learning programme in which young disabled people come to the Action For Kids office, receive training and real work experience in a real office, while helping the charity to continue fundraising.

It was found that for every £1 of investment, £6.37 of social investment was being created through the benefits accrued by the young people, their families, the state and their local community.

This work did not just generate a statistic – it also gave valuable information about what areas of work seemed to be the most socially valuable, and what kind of data was particularly useful in analysing our own work. Our work had been monitored unevenly, leaving areas in which we had very little empirical data and were left to rely upon individual judgement for important areas of feedback and evaluation.

Recommendations were made to involve families, to give them more of a say in service planning in what they felt was important.

Following the SROI study changes have been made in the way that Action For Kids records aspects of its work, and in tandem with the Lottery-funded Participation project, far more information is now formally recorded, and this has given us a more accurate picture of the work that we are doing and how it benefits the disabled young people at the heart of our work.

With the new clearer data, and more involvement from the young people in the work that they did, it was decided to revisit SROI and see what results it yielded; what difference would be made to the figure, and what information resulting from the study could help us in planning the future direction of the Work Related Learning Programme. A clear benefit would also be useful in convincing potential funders of the value of the WRL programme, which as an unusual and complex programme has always been difficult to explain effectively on terms as simple as the charity's Mobility programme.

The WRL Programme

The programme analysed is a Work Related Learning (WRL) programme for young people aged 14-26, based in the Action For Kids Hornsey head office.

During term time around 25 disabled young people a day come into the Action For Kids head office for structured, supported work experience and training. Here they learn and practise a range of office tasks generated by the charity's fundraising activities. Depending on the student's interests and abilities this can include computer work, helping with mail shots, shredding, designing posters, creating thank you cards for our supporters or counting money from charity collection tins.

Action For Kids runs a monthly raffle which is one of the keystones of the charity, not only raising vital funds but giving the disabled students who process the raffle something real to work with and learn from. As part of the WRL programme they process the tickets, learning numeric and concentration skills, as well as experiencing a real office environment. Each day the raffle ticket books are sorted and stuffed into envelopes ready for posting and returned tickets are made ready for the draw. Our students learn to work as part of a team and gain confidence as well as forming lasting friendships, at a time when day services for people with disabilities are being cut back all over the country.

As part of the WRL programme, domestic and other practical life skills are taught such as shopping for and preparing a healthy meal. Occasionally work placements are arranged for more able students, for example in the bakery of a local supermarket.

WRL students work alongside and interact with all Action For Kids paid staff where everyone is valued and the focus is on abilities rather than disabilities. In this friendly, inclusive environment young people are helped to not only learn basic office skills but also to improve communication skills through interacting with staff and one another. Celebrating achievement is part of the Action For Kids approach and the students are awarded certificates formally recording what they have learned and noting their successes.

In the last year this was acknowledged publicly at an awards ceremony to which friends and family were invited, along with the Mayor of Haringey (the London borough in which the charity is based), giving the students a chance to celebrate the achievements with friends and loved ones.

As well as the regular students that come in throughout term time, young disabled people from Special Educational Needs (SEN) schools come in for two-week placements to experience the "Action For Kids" environment.

With the data now being collected it will give us the chance to draw a clearer line between the two-week placement students and the regular students, and understand more clearly what benefits are being accrued by them both.

Section 2 - SROI Methodology

This SROI was conducted using the methodology put forward by the New Economic Foundation. The WRL programme was analysed in the following way:

Stage 1 - Setting boundaries and Impact Map

- Establish the boundaries for the SROI analysis
- Identify, prioritise and engage stakeholders
- Develop a theory of change

Stage 2 - Collecting data

- Select indicators
- Identify financial values and proxies
- Data collection

Stage 3 - Modeling and calculating

- Analyse inputs
- Add up the benefits
- Project value into the future
- Calculate the SROI
- Conduct the sensitivity analysis

Stage 4- Reporting and embedding

- Prepare the SROI report
- Communicate and embed

Section 3 explains how the above methodology was applied to the WRL programme.

Section 3 - The Project

Introduction

This specialist Work Related Learning programme for young people aged 14-26 is based in the Action For Kids' Hornsey head office. During term time around 26 young people a day come into the Action For Kids head office for structured, supported work experience enabling them to learn and practise a range of office tasks generated by the charity's fundraising activities.

As well as acquiring office skills, the WRL students become more confident and independent. They learn teamwork and interact with members of staff in a supportive environment. Most of the young people live with their parents, so at Action For Kids they have the chance to socialise with people their own age, forming lasting friendships and developing a supportive social network beyond their own families.

As part of the WRL programme the students learn life skills such as going to the supermarket to buy food, becoming independent travellers on public transport, or preparing a healthy meal for themselves.

Young people can come to Action For Kids for a two-week trial together with their classmates while still at school, and then having finished school they can choose to come back as a "Regular" student, attending Action For Kids on set days each week.

Stakeholder engagement

Table 3.i presents a rationale for the selection of material stakeholders.

Table 3.i: Stakeholder audit trail

Key stakeholders	Reason for inclusion	Method of engagement	Number engaged
Programme participants: disabled students on the WRL programme	Central to Action For Kids' mission. There is a direct benefit to the students.	Interviews, focus groups	15
The families of WRL students	Direct benefit to parents. Very close to the outcomes being achieved. Siblings of disabled children more likely to have ESBD.	Interviews, interviews with beneficiaries, questionnaires,	1
Disabled staff members: only those who were once WRL students themselves	These disabled adults would not necessarily be employed elsewhere – but they are employed at Action For Kids where they receive a lot of support	Interviews	3
Local government (across boroughs inhabited by WRL service users)	Employed disabled adults don't claim benefits. Increased wellbeing & improved mental health Respite decreases family breakdown	Academic studies, data on benefits Stats on disability & family breakdown (see appendix 3).	n/a
National Health Service	GP visits	Academic studies, data on NHS	n/a

For more details on how stakeholders were identified and prioritised, please see Appendix 2.

Impact maps

The process of engaging stakeholders enabled a theory of change to be articulated for the WRL programme. A theory of change demonstrates how the activities of a programme are realised in the forms of outputs and outcomes. Table 3.ii uses an impact map to display the WRL theory of change.

Table 3.ii Impact Map for WRL programme

Stakeholders	Input	Activity ¹	Output	Outcome
Programme participants: disabled regular students on the WRL programme.	Time	Trained in administrative office based skills and domestic /other practical life skills	Number of students attending WRL	Increased independence and confidence Increased office skills, life skills Increased number of friendships Reduced social isolation
Programme participants: disabled short-term students on the WRL programme.	Time	Introduced to administrative office based skills and domestic /other practical life skills in a new working environment, in a new human environment.	Number of students on short-term WRL programme.	Increased independence and confidence Introduction to office skills. Increased number of friendships Reduced social isolation
The family members of WRL students estimated at 1 family members per student	Time	Support & encourage young person	Continued participation on WRL programme	Improved well being Less time spent on care for family member Reduced family break down
Staff members (disabled adults) – only those who were once WRL students (3)	Skills Time	Process fundraising donations in batches Support and personal care for students	Amount of income processed over a year Number of students supported over	Employed Increased confidence, independence and well being Increased income

			a year	
Local government	N/A	N/A	No. of students gaining work experience, skills and friendships	Reduced levels of poor mental health/ depression in boroughs served by WRL services. Reduced levels of people claiming unemployment (staff members only).
National Health Service	N/A	N/A	Prolonged support for students, improved skills for students	Reduction in care costs

¹Please see storyboard in Appendix 9 for more activities

The above table shows that the simple act of coming to an office and performing office tasks makes a big difference in terms of the feelings of confidence the young person acquires. This in turn results in the student becoming more independent which is good for the young person and good for the family.

The Action For Kids WRL theory of change in Appendix 10 demonstrates that the end result of attending WRL is the resulting independence and happiness generated by attending.

Data collection

Data is required for the outputs listed above in order to demonstrate the benefits of the WRL programme. As the WRL programme is already up and running, existing data has been used to assess the value that has been created. The following table shows the data collection plan.

Table 3.iii Data collection

Stakeholder	Type of data	Method/Rationale
WRL students (short-term and regular)	Evaluative Self-assessment	Interviews Focus groups Student feedback questionnaires Data collected from WRL attendance records. Data is collected from both the short-term students and the more long-term regulars

Family members of students	Evaluative	One to one interviews
Disabled adults employed at AFK (former students)	Evaluative	One to one interviews (to a standardised set of questions).
Local government	Forecasted	Based on projections of what is expected to take place if the objectives of the WRL programme are met, such as reduced levels of poor mental health/depression in borough & reduced levels of people claiming unemployment benefit, the latter applying to employed staff members only.
NHS	Forecasted	Based on projections of what is expected to take place as a positive side effect of the WRL programme (i.e. reduction in illness and stress in carers)

Economic model

The economic model was developed as follows:

1. Allocating outcomes to each stakeholder
2. Monetising each outcome using either financial proxies or direct costs
3. Determining impact by accounting for deadweight and attribution
4. Determining a benefit period and drop off for each stakeholder
5. Projecting value into the future

These will be explained in greater detail below:

1. Allocating outcomes to each stakeholder

Interviews and focus groups with the stakeholders revealed that stakeholders receive different levels of benefit. The students on the WRL programme claim that coming to the programme has helped them a great deal. Almost all when asked the question “How much has coming to Action For Kids helped you?” and asked to allocate marks out of seven said seven (giving an average score of 6.4). Families of the WRL students also benefitted but less directly and to a lesser extent than the students themselves. Disabled adults employed by the charity also ascribe a high value to being employed at Action For Kids. Please see Appendix 4 for quotes from stakeholders. Benefits to the local authority and the National Health Service are forecast estimates and a more modest claim is made for these. The SROI spreadsheet details the incidence of each outcome per client group.

2. Monetising each outcome using either financial proxies or direct costs

Value has been placed on what young people do with new confidence, new skills and abilities by tracking their journey towards inclusion in more productive social and economic activity.

Outcomes for WRL students, their families and those staff members who were once WRL students themselves were assigned a financial proxy. Outcomes for local government and the NHS were assigned a direct cost. Table 3.iv provides examples of financial proxies being applied to outcomes. To see a full list of proxies please see Appendix 7.

Table 3.iv Selected Financial Proxies and Direct Costs

Stakeholder	Outcome	Indicator(s)	Proxy description
<p>Programme participants: disabled regular students on the WRL programme</p> <p>(Primary stakeholders)</p>	<ul style="list-style-type: none"> Skills gained e.g. word processing, basic design Increased confidence, independence & friendships Reduced social isolation 	<ul style="list-style-type: none"> Young person has acquired skills e.g. can perform simple admin tasks Self/parent confidence & peer friendships reported to improve Young person attends activities & social/educational outings 	<p>Cost of a training course in elementary keyboarding skills</p> <p>Cost of Personal Assistant</p> <p>Weekly average household spend on leisure nationally</p>
<p>Programme participants: disabled short-term students on the WRL programme</p> <p>(Primary stakeholders)</p>	<ul style="list-style-type: none"> Introduced to new work opportunities, new skills and new working environments. Increased confidence, independence & friendships and social opportunities Introduction to work experience. 	<ul style="list-style-type: none"> Young person is considered to have improved their skills. Self/parent confidence & peer friendships reported to improve Young person attends activities & social/educational outings 	<p>Cost of a training course in elementary keyboarding skills</p> <p>Cost of Personal Assistant</p> <p>Weekly average household spend on leisure nationally</p>
<p>The families of WRL students</p> <p>(Primary stakeholders)</p>	<p>Less time spent on care for family member</p>	<p>No of hours respite spent with other children or at leisure e.g. average number of hours a week a young person comes to WRL.</p>	<p>Cost of respite service per hour</p>

For a full list of financial proxies please see Appendix 7.

3. Determining impact by accounting for deadweight and attribution

In order to determine the impact or amount of change we can attribute to the WRL programme, deadweight and attribution must be subtracted. Deadweight refers to the

effect of what would have happened to stakeholders anyway regardless of WRL's intervention. Attribution considers what share of each outcome is attributable to other people, organisations and services accessed by stakeholders. Displacement is the final, albeit lesser factor and refers to the fact that when a stakeholder claims a benefit this is at the expense of someone outside the programme. Table 3.v demonstrates how deadweight, attribution and displacement have been applied to each stakeholder, bearing in mind that the latter is a less important consideration.

Table 3.v

Stakeholder	Outcomes	Deadweight description	Attribution description	Displacement description*
Programme participants: regular disabled students on the WRL programme	<p>Increased independence and confidence</p> <p>Increased office skills, life skills</p> <p>Increased number of friendships</p> <p>Reduced social isolation</p>	<p>Estimate of 5%</p> <p>No other work experience programme catering for such a range of ages & disabilities locally. Some young people attend college.</p>	<p>Estimate of 60%</p> <p>Can attribute some of these outcomes to other organisations because WRL students attend drama class, church or other activities</p>	<p>Estimate of 5% based on assumption that there is a waiting list of 9 students waiting to access WRL programme</p>
Programme participants: short-term disabled students on the WRL programme	<p>Increased independence and confidence</p> <p>Increased office skills, life skills</p> <p>Increased number of friendships</p> <p>Reduced social isolation</p>	<p>Estimate of 5%</p> <p>No other work experience programme catering for such a range of ages & disabilities locally. Some young people attend college.</p>	<p>Estimate of 20%</p> <p>All of these students are still in full time education, and supported by their normal teaching staff and peers.</p>	<p>Small displacement – each class from a school only attends once to gain the placement experience.</p>
The families of WRL students	<p>Improved well being</p> <p>Less time spent on care for family member</p> <p>Reduced family break down</p>	<p>No deadweight (few if any similar services for these young people)</p>	<p>Estimate of 40%</p> <p>Some students access services outside of WRL such as attending college.</p>	<p>Determined no displacement</p>
Staff members (disabled adults) – only those who were once	<p>Employed</p> <p>Increased confidence, independence and well being.</p>	<p>Estimate of 66%</p> <p>2 of three staff members feel they would be employed anyway, but not at such a satisfying job.</p>	<p>Estimate of 90%</p> <p>Confidence & independence can be attributed to other organisations. E.g. one</p>	<p>Estimate of 5%</p> <p>Small displacement - if former students weren't employed with</p>

WRL students	Increased income	(100% of former students now employed at charity report AFK is being the best job they've had)	stakeholder volunteers for St John's Ambulance, one accesses a social worker.	support, other people may have filled these roles at the charity
Local government	Reduced levels of poor mental health/ depression in borough Reduced level of people claiming unemployment (staff members only).	No deadweight (few if any similar services for these young people)	Estimate of 40% All three of the employed disabled staff members has held jobs before so a modest claim has been made.	Determined no displacement
National Health Service	Reduction in care costs, illness caused by stress of being a carer	No deadweight (few similar services for these young people)	Estimate of 40% Much of our data is based on self reporting so a modest amount has been claimed	Determined no displacement

* Note that displacement is a "thinking through" exercise and has not been included in the final calculations.

4. Determining a benefit period and drop off for each stakeholder

Stakeholders may experience a benefit from the WRL programme for some time after the period analysed. Thus the value of benefits is projected into the future. A drop off rate is applied to fairly indicate how the effect of the programme may lessen with time. The table below shows the estimated benefit period in years and drop off rate.

Table 3. vi Benefit period and annual drop off rate

Stakeholder	Benefit period in years	Drop off	Rationale
Programme participants: regular disabled students on the WRL programme	4	0.5	Benefit changes attitudes, ambitions and self esteem fundamentally which has an enduring benefit
Programme participants: short-term disabled students on the WRL programme	1	0.5	Benefit changes attitudes, ambitions and self esteem fundamentally which has an enduring benefit.
The families of WRL students	1	0.1	Benefits such as respite and increased time for other children end when child stops attending programme.

			The office, social & domestic skills the students acquire continue to benefit the family.
Staff members (disabled adults) – only those who were once WRL students	2	0.1	While benefits likely only to last as long as the employee is employed at AFK; 2 out of 3 have been employed for many years, in one case has worked here for 12 years.
Local government	4	0.5	Long lasting effects stemming from outcomes for students such as reduced social isolation, increased confidence & skills. Family members enjoy a reduction in hours spent caring.
National Health Service	2	0.1	

5. Projecting value into the future

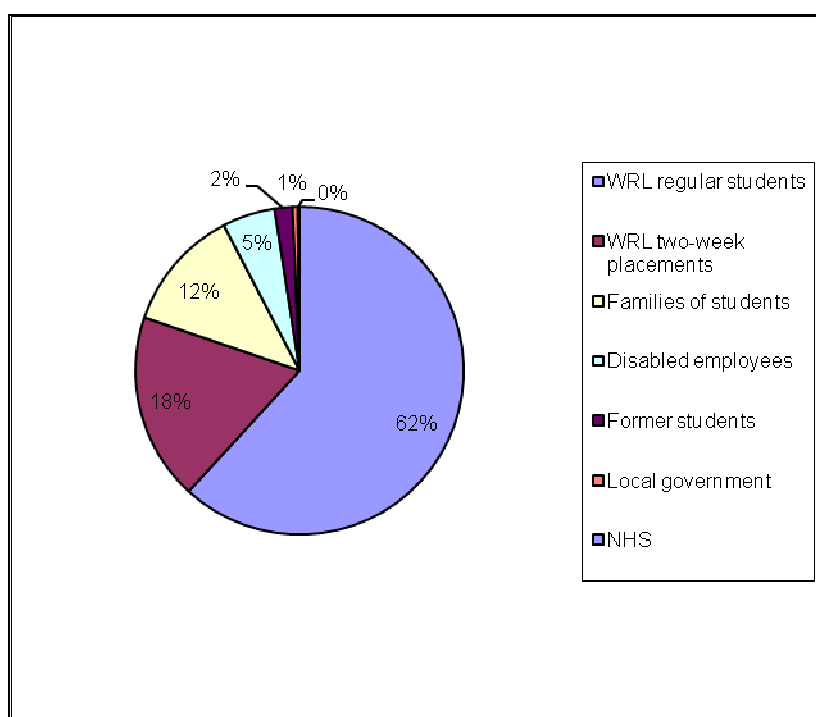
When projecting the benefits of the WRL programme into the future, it is standard SROI practice to discount benefits assumed in the future. The HM Treasury discount rate of 3.5% (taken from the Green Book in 2011) was applied to all future benefits.

Section 4 - SROI ratio and benefits breakdown

The SROI ratio for WRL programme is 1:5.47. By this we mean that for every £1 invested in WRL programme in the financial year April 2011 – March 2012, £5.47 in social value was generated.

This is a conservative ratio and in all likelihood the WRL programme generates more value than this. However it was decided to claim a modest ratio because this SROI relies heavily on qualitative data and self reporting in key indicators, and because there are still important elements of SROI that we feel are not yet represented financially, such as the sense of community and belonging that the WRL programme provides.

Graph 1 shows the breakdown of value by stakeholder.



Graph 1

The most significant value, 62% is obtained by the regular WRL students. This was in line with expectations as they are the primary beneficiaries of the WRL programme. Next is the two-week placement students, who receive 18% of the total benefit – reflecting their large numbers and clear benefit during their time at AFK. Although far more value is gained by the regular students, most of this is due to a shortage of alternative options for disabled people in this category, and it is rare to find a regular who was not first introduced to Action For Kids through the two-week placements. The two-week placements are missing their normal schooling to come to Action For Kids, while the regular students are generally not experiencing a similar opportunity cost.

The families of WRL students are next, benefiting from 12% of the social value generated by the charity's activities, and many families involved with Action For Kids will testify to the wonderful qualities that they feel it brings out in their children, and

how much it helps them as a family. Early on it was considered that there could be a greater benefit to siblings, as having a child with Special Educational Needs (SEN) statistically gives a greater chance of a poorer educational outcome for siblings, but the statistical difference was so small that in the population size the outcome was not considered material.

The NHS receives under 1% of the overall benefit generated by this programme. While in the previous study the NHS received a much stronger benefit, in this study the decision was made to change the metric used to measure this for a more modest claim – that we would only claim for the possible GP costs to the NHS, rather than for more costly respite care. This means that the low number of family members associated with the regulars accrues only a small benefit.

Local government receives 1% of the total value. This is because the benefits to local government are primarily around employment and we considered only the three staff members at Action For Kids who were once WRL students themselves when looking at employment.

The benefit obtained by the three staff members who were once WRL student appears small on this graph, with just 2% of the overall benefit. This report found that these stakeholders place a very high value on being employed at the charity and a high attribution claim of 90% was made to reflect this. The small percentage is simply due to the small population in this category.

Sensitivity Analysis

Because assumptions were made during this report, a sensitivity analysis was performed. This analysis tests how the SROI ratio changes when assumptions are changed. The following factors were varied:

Attribution: This had a big impact on the overall ratio. It was decided to claim modest amounts for the NHS and local government and higher amounts for the stakeholders we had interviewed, namely the WRL students, their families and the staff members who were once WRL students as we had self reporting to back up the claims.

It was decided to increase the amount of attribution for the three former WRL students employed here from 80% to 90% taking into the length of time Ben & Jolene have been employed here and the almost parental level of involvement given by staff.

It was decided to reduce the amount of attribution for the families of students from 80% to 40% because the parents who are very involved in the charity and have reaped benefits over the years are in the minority.

Recommendations

Some measurement recommendations for Action For Kids Work Related Learning programme arose from doing the SROI.

Measurement recommendations

The story of change for Action For Kids currently gives us an excellent narrative that takes young disabled people from school age to being keen to enter the workplace. The recent addition of a Transitions Officer to help young people from Action For Kids into work should give us data that allows us to track young people on their journey. As well as giving an excellent measurable outcome, we will be able to measure the cost and SROI of “The AFK Way”, taking young disabled people on a two-week placement, eventually helping them into employment, and the important journey that happens in between, when we would expect to see a high level of social value added.

It has also been apparent that there are few tools available for measuring “distance travelled” among the disabled young people, especially when it comes to social development, a large benefit of the WRL programme. An effective measurement or proxy for this area would both help the young people to understand the progress that they were making, and I suspect would make a considerable positive change to the SROI ratio.

The AQA Unit Award Scheme has represented an excellent method of measuring the students’ attainment. With the data that comes from further student attainment we may be able to draw better conclusions about exactly what skills we are developing in the students.

Continued engagement with parents and families with planning and feedback will enable us to learn more about how our services affect them, and where we are providing the most benefit to this important group – a group that is directly mentioned within the remit of Action For Kids. At the moment we have very poor data to represent how we are helping parents and families, with most of our information coming from past interviews and anecdotal evidence.

Appendices

Appendix 1 – Boundary setting and impact mapping

Appendix 2 – Identifying, prioritising and engaging stakeholders

Appendix 3 – Statistics on disability and family breakdown

Appendix 4 – Quotes about AFK from students, parents and staff members who were once students themselves

Appendix 5 – Self reporting on indicators

Appendix 6 – Financial proxies and direct costs

Appendix 7 – Statistics on disability and unemployment

Appendix 8 - SROI storyboard

Appendix 9 – WRL theory of change

Appendix 10 – Data table for Action For Kids

Appendix 11 – List of research reports used

Appendix 1 Boundary Setting and impact mapping

About the WRL Programme

This specialist Work Related Learning programme for young people aged 14-25 is based in the Action For Kids Hornsey head office and we also provide an outreach programme to schools and colleges across North London, with our services stretching from Middlesex in the west across to Hertfordshire in the north and Essex in the east.

During term time around 25 young people a day come into the Action For Kids head office for structured, supported work experience enabling them to learn and practise a range of office tasks generated by the charity's fundraising activities. Depending on the young person's interests and abilities this can include computer work, helping with mail shots, shredding, designing thank you cards for our supporters or helping with fundraising projects. In addition domestic and other practical life skills are taught, for example shopping for and preparing a healthy meal. Young people work alongside and interact with all Action For Kids paid staff where everyone is valued and the focus is on abilities rather than disabilities. In this friendly, inclusive environment young people not only learn some basic office skills but also improve communication and team working through talking with and interacting with a range of staff and other young people. Celebrating achievement is part of the Action For Kids approach and at the end of each week the whole staff gather with the young people to award certificates recording what they have learned and thanking them for their contribution to Action for Kids.

Scoping

What do you want to measure?

Action For Kids has a number of services, including a Mobility service providing wheelchairs, a national Helpline, a maintenance and repair programme and a Family Support Service.

After discussions in the Senior Management Team (SMT) meeting, it was decided that the SROI report will evaluate one of the charity's services, namely the Work Related Learning (WRL) programme.

There were several reasons for choosing the WRL programme to be assessed in the SROI:

- The WRL programme is unique whereas many other charities supply wheelchairs.
- One of the things that makes WRL unique is that young people with disabilities come into the charity's head office every day to do real work in a real work place. That means the SROI researcher has plenty of access to these young people, who are some of Action For Kids' key stakeholders. Other stakeholders such as the children accessing our Mobility service are based all over the country and are not only less accessible but the relationship is not ongoing in the same way that the relationship with the young people on the WRL programme is.

- In terms of fundraising, it is relatively easy to create a marketing appeal for funding for mobility equipment. Traditionally such appeals at Action For Kids have been very successful. An appeal depicting a young person in need of a wheelchair is very effective and easy for supporters to grasp. The benefits of the WRL programme are harder to convey on paper because typically appeals work best with a specific case study comprising a picture of a child and a call for funding to purchase a tangible wheelchair. Past Action For Kids appeals based on the WRL programme have not been successful as there are many complex elements to the programme which can best be conveyed in a detailed report. Thus it is hoped that an SROI report showing the benefits of the WRL programme may lead to funding for this programme. There is no business case for doing a detailed report on mobility, as staff members who fundraise for equipment have no need of an SROI report.
- Appeals for funds for wheelchairs are directed at members of the public who are not aware of SROI reporting. Appeals to fund the WRL programme are aimed at local authorities who are aware of the value of well being and in some cases, SROI reporting.
- The benefits of receiving a wheelchair are obvious and self-explanatory whereas the benefits of the WRL programme lend themselves to being quantified and analysed.

For the above reasons it was decided in the SMT meeting to evaluate the WRL programme only.

It was decided to measure one year's intake of programme participants known at Action for Kids as students. The WRL programme has been going for 12 years and it would be difficult to gather data from this large period. The current students are based on site and are available for interviews. In addition it was decided to measure in-house programme participants only.

Are you an independent researcher or do you work within the organisation you wish to study?

The SROI report will be conducted by the Evaluations Manager, a member of the Action For Kids fundraising team.

Why do you want to begin this process now?

SROI is an effective way of measuring what matters. Action For Kids believe our work is very valuable and would like to prove that this is the case and communicate to supporters, stakeholders and funders the benefits of what we do. An SROI report can help an organisation to make hard decisions about how to allocate resources. In addition funders are starting to ask to see SROI ratios as part of pitches for funding.

Who is this analysis for?

The primary audience is Action For Kids, to learn what the charity is doing well and measure the WRL programme's successes. The secondary audience will be potential funders.

What is the timeframe for the analysis?

NEF have advised that the work will take 30 days. The report could be ready in August 2012.

Who will be responsible for the work?

The SROI will be carried out in-house. This was decided for a number of reasons. One reason was to acquire and keep knowledge about SROI within the organisation and pave the way for future SROI reports to be conducted in-house. Another reason is that the SROI researcher is known by and familiar to the young people in the WRL programme so they are likely to be forthcoming. The Business Development Director will oversee the project. The SROI will be conducted by the Evaluations Manager.

What resources will be required and are these available?

The CEO has agreed with various managers to free up the SROI researcher's time. The Finance Director is aware that help may be required performing SROI calculations at the end of the SROI and that the charity's financial data will be needed. The WRL Director is aware of the need for access to the young people on the WRL programme.

What will you measure?

What are the activities for which you want to determine an impact?

Action For Kids wants to measure the impact of the Work Related Learning Programme. In particular the benefits for

- the young people themselves,
- their parents and siblings
- the state

The WRL programme aims to give disabled young people opportunities and more independence. Some young people do work experience placements in local shops and businesses. All of the students acquire confidence, self esteem, friendships and increased well-being.

Action For Kids wants to measure how attending this programme and acquiring these skills affects the stakeholders.

It is important to note that the young people on the programme fall into 2 distinct groups.

- The '**regulars**': students who attend the WRL programme frequently and have done so for years. Many of them are over the age at which services for disabled young people dry up, and there is nowhere else for them to go.
- The '**short termers**': students who do one two-week placement* on the programme only. These young people are pupils SEN pupils in mainstream

schools, colleges, and special needs schools, and attend Action For Kids on a finite work experience programme, although many will later come back to Action For Kids to take part in the WRL programme as a “regular” student.

* In principle it is a two-week placement, but for some students this will be stretched out (for example for those with particularly serious disabilities from special needs schools a whole day may be inappropriate to their needs, so half-days for a much longer period may be used instead).

Describe the intended participants or targeted population

All in-house participants on the WRL programme over the course of one year (April 2011 – March 2012). The students on the programme are aged 14 to 26 and have physical or learning difficulties and in some case they have both. Some of the regulars are older than 26, and are Peer Mentors to younger and newer students as well as continuing to participate in the programme themselves. Placements are offered to young disabled people within our catchment area of 14 London boroughs.

Over what time period will social returns be measured?

Options considered were:

- From the launch of WRL up to the present day
- Over one financial year
- Follow one class or intake all the way through

Because the previous SROI study was conducted over one financial year, it was considered that for comparative purposes extra value would be gained from following the same period, allowing closer comparison between the groups involved. It was decided to measure the benefits of the WRL programme for one financial year, April 2011 to March 2012 for the reasons stated above.

The SROI will project benefits 4 years into the future after a student has left WRL.

Appendix 2 Identifying, prioritising and engaging stakeholders

Direct or indirect	Key stakeholders	Reason for inclusion	Method of engagement
Direct	Programme participants: disabled students ¹ on the WRL programme	Central to Action For Kids' mission. There is a direct benefit to the students.	Interviews, Have surveys.
Direct	The families of WRL students	Direct benefit to parents. Very close to the outcomes being achieved. Siblings of disabled children more likely to have ESBD.	Interviews, questionnaires,
Direct	Disabled staff members: only those who were once WRL students themselves	These disabled adults would not necessarily be employed elsewhere – but they are employed at Action For Kids where they receive a lot of support.	Interviews
Direct	Former students now employed or volunteering elsewhere	Are now employed within the wider community, have successfully used Action For Kids' services to lead independent lives without the specialist ongoing support available at Action For Kids.	Interviews
Indirect	Local government	Employed disabled adults don't claim benefits. Increased wellbeing & improved mental health Respite decreases family breakdown	Academic studies, data on benefits Statistics on disability and family breakdown (see appendix 3).
Indirect	National Health Service	GP visits for depression	Academic studies, data on NHS

¹ Students are split into 2 distinct groups, regular students and short term students. The difference between them is explored in Appendix 6.

Excluded stakeholders	Reason for exclusion
Charity staff members	Staff would work elsewhere if they did not work at Action For Kids
Trustees	Trustees could be involved in other charities if they were not helping Action For Kids
Funders	Not included as they don't receive a benefit
Volunteers	Not central to service delivery, charity could continue to deliver without their input
Central government	As the local government is included, national government is excluded here to avoid double counting
<i>Families of disabled adults employed at Action For Kids Considered including these but did not – not material</i>	<i>Excluded because there is only a small number – 3 families. One parent is a trustee at the charity so may not be objective. Not all of these employees live at home.</i>
<i>Teachers at special schools whose pupils come into Action For Kids Considered including these but did not – not material</i>	<i>Excluded because not material</i>

Stakeholder engagement plan

Stakeholder groups	Method of engagement	How many to contact from each group	When to complete	Who is responsible	Goals	Project specific objectives
Students	Surveys	20 regular students	15 th -20 th July 2012	Evaluations Manager	Greater independence	Acquire office skills Acquire domestic & other practical life skills eg using public transport
Family members of students	One to one interviews	Previous data used	30 th May – 4 th August 2012	Academic from Middlesex University	Want their children to feel useful, fulfilled, secure and confident	Attend WRL classes where focus is on ability, not disability.
Disabled adults employed at AFK (former students)	One to one interviews	3	30 th May – 4 th August 2012	Evaluations Manager	Be employed full time, be more independent	Remain in paid work Job satisfaction and training
Former students now employed or volunteering elsewhere	One to one interviews	5	30 th May – 4 th August 2012	Evaluations Manager	Job satisfaction and participation in community and / or world of work	Job satisfaction and training
Local government	Academic studies/ data	n/a	n/a	Evaluations Manager	Reduce unemployment Reduce stress on carers	Improve local employment Improve mental health of citizens
NHS	Academic studies/ data	n/a	n/a	Evaluations Manager	Improved mental health	Increased employability for participants Reduce care costs

Table of stakeholder objectives and goals for AFK WRL Programme

Stakeholder	Description	Goals	Objectives for AFK
Programme participants 1 year's intake	Students on the WRL programme with physical or learning disabilities	Greater independence through: gaining work experience and office skills, life skills, mixing with other young people / peer group	Help students become more employable Teach practical life skills Increase students' confidence and self esteem
Students' families	The parents and siblings of disabled WRL students	Child to become confident and fulfilled through gaining work experience and life skills Respite from care	Student to gain skills Student to increase confidence and self esteem Classes and evening activities give family a break from caring
Employees	Paid staff members at charity – disabled adults who were once WRL students	Earn income from employment Job satisfaction and social interaction with colleagues	Train employees Support fundraising assistants as they raise funds to continue charity's work Support WRL assistant as she provide cares and assistance to students
Former students now employed or volunteering elsewhere	Young people who have finished the WRL programme and now work or volunteer at other organisations	Job satisfaction and participation in community and/or world of work	Former students take skills acquired at AFK out into the world
Local government	Local borough councils	Reduce unemployment Reduce stress on carers	Improve local employment Improve mental health of citizens
National Health Service	Local Health Authority and Social Services	Improved mental health	Reduce stress of being full time carer

Appendix 3 Statistics on disability and families

- Thirty two percent of disabled children live in lone parent families, compared to 22% of other children
- Thirty-two percent of families supporting a disabled child have no one working for more than 16 hours per week, compared with 16% of other families
- Being the sibling of a disabled child doubles the chance of having an emotional, behavioural or social disorder.

*Statistics on disability from New Philanthropy Capital 'What price an ordinary life?'
The financial costs and benefits of supporting disabled children and their families'
Jan 07*

- 52% of adults with learning disabilities live with their parents.

Source: Equality and Human Rights Commission

Working and caring

For many parents it is clear that work offers an important 'safety-valve' and the opportunity to leave the worries of home life behind for a few hours to spend time in the 'normal' world. It is also felt that it is healthier for the couple and the wider family not to focus entirely on the needs of the disabled child. Work is also of course essential for many to maximise their income and minimise their financial worries.

Many however felt that it was not worth their while working for over fifteen hours a week, because they are then 'penalised' by the benefits system. Lack of appropriate childcare can also prevent parents from working when they wish to. Others had found it had helped if, as a couple, they could decide on one working and the other being a full-time carer for their child. For one couple, having the 'excuse' for neither to work full-time had allowed them more time together than they would otherwise have had.

*Source: No Time for Us, Relationships between Parents who have a Disabled Child,
A survey of over 2000 parents in the UK December 2003*

Appendix 4 – Quotes about AFK from students, parents and staff members who were once students themselves

STUDENTS

“Coming to AFK has changed my life. Going out and making new friends”

“Yes I do feel more confident at AFK, Good experience for me”

“I was ecstatic to be offered a role as peer mentor at Action For Kids after leaving school. Without it my chances would have dwindled away to nothing and my life would have spiraled out of control”.

“Life would have been very different if I had not come to Action For Kids. I would have faded into the background and become invisible. Now I feel useful”.

“I'm learning to be more patient and listening to others and learning new skills at AFK”

FORMER STUDENTS NOW STAFF

“If it weren't for AFK I would still be getting stressed at the job centre. I'd be sitting at home doing nothing if I wasn't at AFK”.

“Apart from being demoted there were many other negative and degrading incidents at work (at my supermarket job). I allowed this to carry on as I had a low self-esteem and things at the back of my mind told me maybe my work was substandard and that they were making allowances for the fact I got the job through Mencap. And that that was the best job I could get. Until the day I came to work at AFK as a member of staff for the first time. This was a great revelation for me that my work was actually worth something. I think had it not been for my time at AFK both as a student and a part time staff member, I don't think I would have come as close to realising my true self worth.”

“Everybody had told me I am capable of getting a job but only Action For Kids has given me a proper job”.

PARENTS

“Has more authority and confidence to speak as a person with disabilities”

“He enjoys going to the office, makes him feel valued.”

“Has more confidence in herself. Develop working and everyday skills”

“Has been kept busy and developed social skills further, rather than just staying at home on days when he doesn't have college”

“It's giving me peace of mind knowing he is occupied and happy.”

"The ethos of encouraging individual student's strengths rather than criticising their weaknesses has made XX want to do his best and to contribute and has made him feel good about himself. He is a much happier more motivated person."

"Helped with confidence and self esteem, found the staff very friendly and helpful."

"Thank you very much for this great opportunity. It has/is a real boost for XX and gives him an insight into potential opportunities for his working life."

"XX is enjoying the boy's nights every two weeks. Spoke about making pancakes recently."

"XX usually does two weeks work experience at AFK during the summer months. It's giving me peace of mind knowing he is occupied and happy. There's little other opportunity for a young man of his age."

"I definitely have more "me time" (when XX is at AFK). I am a gym member so am able to de-stress and meet some friends too."

"XX has now started attending the "Boys Night In" club every other Thursday. This frees me up for a few hours. He enjoys meeting new friends and socialising with his own age group."

"I'd do anything for Action For Kids because they have made my family happy."

"I have nothing but wonderful things to say about Action For Kids, because you are so good at bringing out the best in my daughter, and I am fully supportive of all the brilliant work you all do!"

AFK staff	Activities outside of AFK?	Happier since coming to AFK	More confident since coming to AFK	More friends since coming to AFK	Marks out of 10 - how much has WRL helped you?
Staff member 1	exceptional amount of overseas travel	yes	yes	yes	10
Staff member 2	works part time in supermarket (described as negative experience on his blog)	yes	yes	yes	8
Staff member 3	St John's ambulance, drama group	yes	yes	yes	10



Appendix 7 Financial Proxies and Direct Costs

Stakeholder	Outcome	Indicator(s)	Proxy description
<p>Programme participants: disabled students on the WRL programme</p> <p>(Primary stakeholders)</p>	<ul style="list-style-type: none"> Skills gained eg word processing, basic design Increased confidence, independence & friendships Reduced social isolation 	<ul style="list-style-type: none"> Young person has acquired skills eg AQA/OCN qualification Self/parent reporting on confidence & peer friendships Young person attend activities & social/educational outings 	<p>Cost of an AQA/OCN qualification</p> <p>Cost of Personal Assistant</p> <p>Average household spend on leisure nationally</p>
<p>The families of WRL students</p> <p>(Primary stakeholders)</p>	Less time spent on care for family member	No of hours respite spent with other children or at leisure eg average number of hours a week a young person comes to WRL.	Cost of respite service per hour
<p>Disabled staff members: only those who were once WRL students themselves</p> <p>(Primary stakeholders)</p>	Employment and increased income	Person employed for more than 6 months, satisfaction with work	Average income of disabled employees
	Improved well being and independence in daily routine	Disabled staff at AFK reporting feeling happier, more valued, more independent	Cost of carer or personal assistant
Former students now employed or volunteering elsewhere	In work or voluntary placement	Number of former students who have jobs or are employed	Subscription to website with job opportunities (/year)
Local government	Reduced levels of poor mental health/ depression in borough	Parents reporting improved physical/ mental health of WRL students	Cost of private health insurance
	Reduced level of people claiming unemployment	Disabled people employed at AFK.	Value of tax and benefits savings
National Health Service	Reduction in stress, illness caused by stress of being a carer	Lower level of GP visits	Cost of GP visit to NHS

Appendix 8 Statistics on disability and unemployment

- Disabled people are more than twice as likely as non-disabled people to have no qualifications (26% as opposed to 10%)
- Only 17% of people with learning disabilities are in paid work.
- There are 1.2 million disabled people in the UK who are available for and want to work.
- There are 6.8 million disabled people of working age in Britain - 1 in 5 of the total working population.
- Only 50% of disabled people of working age are in employment compared to 81% of non-disabled people.
- The average gross hourly pay of disabled employees is 10 per cent less than that of non disabled employees.
- The average gross hourly pay for disabled employees is £10.31 compared to £11.39 for non disabled employees

Source: UK's Office for National Statistics' Labour Force Survey, Sept - Dec 2006, for people of working age only.

- More than 2.5 million individuals receive incapacity benefit and/or severe disability allowance.

Source: MIND

- Disabled 16 year olds are twice as likely to be out of work, education or training as their non-disabled peers.

Source: Disability Rights Commission

- Disabled adults are twice as likely to be living in poverty than non-disabled adults.

Source: Equality and Human Rights Commission

- Almost one quarter of disabled people lack functional literacy, compared to a national average of one sixth, and 31 per cent lack functional numeracy, compared to a national average of 20 per cent.

Source: Equality and Human Rights Commission

The average additional lifetime costs for living support and education for someone with high functioning autism is £2.9m

- Source: http://www.autismspeaks.org.uk/economic_impact_of_autism.html

The social cost of autistic spectrum disorder in the UK is at least £1 billion annually (cost of education, institutional care and related social services), and the average additional lifetime cost per person is £2.9 million. Currently only 7% is spent on education, yet even a moderate increase in this area would potentially lead to major savings in later life. *Source: TreeHouse Autism Charity*

Appendix 9 SROI STORYBOARD SUMMARY

1. Given the context (i.e. what is going on in work / home life) why is the WRL service valuable?

- Few places for young people with disabilities to go.
- Most services for disabled young people dry up at 18.
- Few opportunities for work for disabled people; “Nowhere to go and nothing to do’
- Poverty of expectation, romance, relationships.
- Feelings of unlikely to be employed. Feelings of loneliness. “It’s scary out there.”
- WRL gives young people an opportunity and helps them to make the most of it.
- Gives disabled young people access to a wide range of organisations and industries.
- WRL focuses on ability, not disability.

2. What activities will take place as part of the WRL project?

- Open College Network (OCN)/Assessment & Qualifications Alliance (AQA) Unit qualifications – giving students real qualifications in areas including domestic skills, office skills, and more creative areas such as pod-casting and animation.
- Office work – typing, design work e.g. posters, certificates and thank you cards on computer, preparing CVs, occasional work experience placements for the more able e.g. at supermarkets, charity shops
- Domestic and practical life skills – healthy eating, art projects, shopping for food, gardening, using public transport
- Educational trips – Wimbledon, the Rix Centre, Olympic Village
- Social activities – Boys Night and Girls Night clubs, bowling, Action For Kids disco, shopping and cinema trips, local carnival

3. What initial changes do we see when a young person starts to attend WRL?

Less shy, inclined to be positive about abilities, happier, more social life, break for families

4. What medium term changes do we see when a young person attends WRL?

Increased confidence, form friendships, acquire new skills, willing to try things by themselves

5. What long term changes do we see when a young person attends WRL?

More independent young person with greater wellbeing and self-esteem. Some of the young people gain an OCN/AQA qualification. Families feel less pressurised and

stressed. Young person feels ready to “graduate” and move on to employment outside the relatively sheltered AFK environment.

6. How do the initial changes lead to the medium term changes?

If the young person is less shy and more sure of their ability, they rely less on parents/carers and do more for/by themselves. As they encounter successes they are more likely to keep trying, and those around them are more likely to allow them the space to try.

7. How do the medium changes lead to the long term changes

Young person forms more friendships and therefore happier and has greater well-being than before. Young person does more things without parents, which makes her more independent and parents have respite and improved mental health.

8. What long term challenges do you see?

- Some parents may find it hard to “let go” and feel protective of the young people and do not want them to go out alone. They may also find it quicker and easier to do things for the young person.
- The charity’s resources (funding and staff) are limited so while the young people get a lot of individual attention they do not benefit from 1-1 training.
- The ability of the young people varies, so while some may learn a great deal others will acquire fewer skills.

Appendix 10 WRL Theory of change

Inputs	Activities >	Outputs >	Outcomes
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Action For Kids WRL Theory of Change

Funding > Trainers/ WRL supervisors >	>Introduces disabled young people to a working environment with new social opportunities. > Teaching disabled young people office and life skills within an immersive learning environment. > Social opportunities provided and encouraged.	196 people participating in two-week placements and regular students on the WRL programme between Apr 2011- Mar 2012.	Young people who are happy, confident, ready to find work, and eager to participate in the community with others.
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	Indicator	Data (for one year unless otherwise stated)	Source/ description
Inputs	Funding raised by donations, trusts, sponsorship, events & campaigns and directed towards defined areas of WRL programme.	£750,218	Action For Kids
Outputs	No. of students attending WRL in-house in period reviewed	196	Action For Kids WRL end of year report 2012 (See Appendix 12)
	Income processed over a year.	£515,713.21	Cash that comes into the charity that has to be processed and recorded for appropriate financial tracking.
	Number of students assisted over a year (personal care)	300	6 people a week receiving personal care helped by the WRL assistant who was a WRL student, now employed by charity.
Outcomes	Increased office skills, life skills	211 learning accreditations delivered.	Action For Kids WRL end of year report. Source: Action For Kids.
	Increased confidence & self esteem	Qualitative – self reported (see questionnaires and interviews)	Revealed in stakeholder interviews and focus groups 08 -09
	No. of former students now paid staff	3	Action For Kids
	Average salary for disabled adults (former students) on the AFK staff	£9712 per person (p/a avg)	Average annual salary of former students (includes part-time employee).
	Tax income for government (generated by 3 employed former students)	£804 per person (p/a avg)	Average income tax paid, based on statutory rates (includes part-time employee).
	Benefit reduction	Looks like for one person £2137.20 - £6838	DWP statutory rates for Incapacity benefit, income support and job seekers allowance
	Cost to NHS GP visit	£76	Cost to NHS according to Personal Social Services Research Unit at Kent University.
	Reduction in dependency on carers – no. of hours respite from care	30 hours – for one person in a week, for each place	Maximum of 26 students x 6 hours a day x 50 weeks x 5 days a week. Source: Action For Kids
Impact	Dead-weight: number of students who would access training & work experience anyway	0	No other organisation takes students at such a wide age range (14- 26 +) or such a mix of disabilities (physical such as Cerebral Palsy or <i>Duchennes</i> and learning disabilities eg autism).
	Dead-weight: number of disabled adults who would be in paid work if not at AFK	All had worked before AFK however these jobs were less fulfilling/responsible (supermarket, post room, security) so small deadweight 100 – 80% = 20% Better work at AFK but require more support from staff. Does this require any deduction?	
	Displacement	5%	Other people might have the 3 jobs at the charity if the former students were not employed.
	Attribution (AFK's share of outcome)	60%	In stakeholder interviews students stated that AFK had made a significant difference and had been key in accessing further opportunities, but one former student was already in work that he had found himself.

Appendix 11 Data table for Action For Kids

Appendix 11 – Research used

Disability Review 2009 – Leonard Cheshire Disability

Changing lives – A report on the autism voluntary sector 2010 – New Philanthropy Capital

Rights of passage – Support disabled young people through the transition to adulthood – New Philanthropy Capital

The social and economic value of short breaks 2009 – nef consulting

Stuck at home 2012 – Mencap

Fulfilling and Rewarding Lives – Statutory Guidance 2010 - Department of Health