



University of Salford
A Greater Manchester University

*Evaluating the performance of Unlimited Potential
as the Salford LINK Host
- using social return on investment methodology*

Final Report
for

SALFORD CITY COUNCIL

March 2011



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1. Summary

This report comprises the findings of an evaluation of Unlimited Potential's performance as the 'Host' of the Local Involvement Network (LINK) in Salford.

LINKs have the role of giving communities a stronger voice in how their health and social care services are delivered.

The LINK Host is responsible for promoting the LINK in Salford and supports it in carrying out an agreed programme of activities which, amongst many things, includes promoting and supporting the involvement of local people in the commissioning, provision and scrutiny of local health and social services

The evaluation was commissioned by Salford City Council (SCC).

SCC requested that social return on investment (SROI) was used as the evaluation methodology.

SROI works on a framework for measuring and understanding outcomes of an organisation's activity and considers social, economic and environmental outcomes – whilst determining those which stakeholders deem to be most relevant.

The University of Salford undertook the evaluation using forecast SROI calculations.

The evaluation focused on activity delivered by the Host during the third year of a 3 year contract – a contract awarded to local social enterprise, Unlimited Potential and worth £140k in year 3 and £378k in total.

Various 'stakeholder' groups were involved throughout the evaluation acting as respondents and participants in research interviews and workshops – these included:

Qualitative feedback found that:

- Both strategic stakeholders (statutory services) and commissioned projects (local third sector organisations) alike, believe that ***the Host has performed its role well***
- Unlimited Potential's strength in the local area, its ability to network, communicate with partners & the third sector and reach out and engage with hard-to-reach and diverse groups were all commended and believed to have played a significant part in successfully undertaking its role as Host
- Respondents were likely to express most concern or suggest areas for improvement when considering issues of how local organisations were commissioned, research project specification & methodology and the ultimate usefulness or likelihood of research findings from the commissioned projects influencing policy / delivery
- Whilst these issues were not specifically the responsibility of the Host, respondents from the commissioned organisations were understandably, not always ready to make such distinctions and judgements tended to be made in reference to the LINK as a single entity

- An apparent 'creative tension' between the Host and LINK has in the main, been positive and productive, however respondents from several stakeholder groups suggested that the LINK required careful management and guidance to ensure proposed activities matched the needs raised during public consultation

SROI analysis found that:

- A figure of £1.66 is returned i.e. estimates suggest **for every £1 invested in the LINK Host, £1.66 of social value is created in Salford**, especially for local third sector organisations
- Host activities have generated further value for which there are currently no financial proxies. Individual impacts on the wider LINK membership and on local residents themselves have not been included in the calculations. Estimates and assumptions relating to those outcomes included in the calculations are conservative
- For these reasons, the **social return calculations likely underestimate the true social value** created by the LINK Host

2. Introduction

This report comprises the findings of an evaluation of Unlimited Potential's performance as the 'Host' of the Local Involvement Network (LINK) in Salford.

The evaluation used qualitative investigation and specifically, was designed in order to be able to estimate the role of the host in terms of its *social return on investment* (SROI).

The evaluation was undertaken by the University of Salford with fieldwork taking place throughout autumn 2010, culminating in a stakeholder workshop in early 2011.

3. Background

LOCAL INVOLVEMENT NETWORKS

In July 2006 the Department of Health published plans to strengthen the ability of local communities to influence the care they receive from Health and Social Services. As part of a wider review into public involvement, the government made £84 million available over three years (2008-2011) to fund Local Involvement Networks, known as LINKs. LINKs had a clear vision: to give communities a stronger voice in how their health and social care services are delivered.

Run by local individuals and groups and independently supported - the role of LINKs is to find out what people want, monitor local services and to use their powers to hold them to account. LINKs were established to:

- ask what local people think about local healthcare services and provide a chance to suggest ideas to help improve services
- investigate specific issues of concern to the community
- use its powers to hold services to account and get results
- ask for information and get an answer in a specified amount of time
- be able to carry out spot-checks to see if services are working well (carried out under safeguards)
- make reports and recommendations and receive a response
- refer issues to the local 'Overview and Scrutiny Committee'

LINKs built on the previous work of Patient and Public Forums – bodies attached to Primary Care Trusts and designed to improve frontline healthcare. However it was envisaged that LINKs would go a stage further by involving people within local communities in influencing the design of local services. By making them open for anyone to join, it was hoped communities would find it easier to say how they felt and talk with those who plan and run health and social care services.

The NHS Centre for Involvement ¹ states that local people need to shape health and social care services whether provided in hospital, within the community or in people's homes and that LINKs have the potential to:

¹ NHS Centre for Involvement – what LINKs mean for communities

Provide a single approach to monitoring health and social care

A LINK for every Local authority with social services responsibilities will be tasked with finding out the view of people in that area and holding the local authority, the NHS and providers to account.

Provide a stronger, more independent voice

Not run by any public or Government organisation, LINKs will be truly independent. They will be hosted and supported by a community organisation with experience of engaging with local people.

Be more representative

Expected to ask every section of the community for their views and experiences, LINKs will not only amplify the views of more groups and individuals in the community, they should also provide a platform to those who might not often have their voice heard.

At the heart of LINKs was the desire to make community involvement more convenient. LINKs were tasked with providing more ways of engaging with local people, especially those who it was often previously easier to ignore. They were required to provide communities with more opportunities to express their views (using the internet, focus groups, events and through other mechanisms) whilst those who wanted to get more involved, should be given the chance to (for example by giving up time to work on a specific issue or joining a group that governs the LINK).

LINKs were established in each Local Authority district and although each community was able to decide how they wanted their local LINK to be run and what issues they wanted to focus on, it was a requirement of each local authority to contract an organisation (known as a host) to set up and then run a LINK.

THE ROLE OF THE 'HOST'

The role of a 'Host' organisation is to enable, support and facilitate the activities of a LINK², which includes recruiting people and groups to the LINK, helping to establish governance arrangements, making administrative arrangements in respect of LINK activities, keeping financial records and communicating the activities of the LINK and their outcomes to the local community.

THE SALFORD CONTEXT

Salford City Council's (SCC) began its search for a LINK Host in the spring of 2008. An invitation to tender (ITT) was circulated in April which clearly stated its vision of the principles and description of services required by a Salford-based Host.

Central to this was their desire to receive interest from organisations which had a strong community focus, could demonstrate the influence of the community in shaping their organisation and from those which sought to invest and profit from their operations in order to deliver maximum benefit to the community.

Specifically, the ITT stated that the 'Host' would be responsible for promoting the LINK in Salford and support it in carrying out an agreed programme of activities in with line statutory duties and relevant government guidance and must:

² NHS Centre for Involvement – The role of the Host

- Promote and support the involvement of local people in the commissioning, provision and scrutiny of local health and social services.
- Obtain the views of people about their need for, and experiences of local health and social care services.
- Enable people to monitor and review the commissioning and provisioning of care services.
- Raise the concerns of local people with those responsible for commissioning, providing, managing and scrutinising services.

UNLIMITED POTENTIAL

Local organisation, Unlimited Potential was awarded the contract to undertake the role of Salford LINK Host in summer 2008. Set up by local people as social enterprise Community Health Action Partnership in 2002 by local people, the organisation changed status from a limited company to an industrial and provident society (a community benefit society) and changed its name in 2009.

Based in central Salford and providing a range of health and social care services to the local community, Unlimited Potential became the first social enterprise in the North of England to receive the Social Enterprise Mark and is recognised as one of the fastest growing social enterprises in health and social care in the UK according to the Social Enterprise 100 Index³.

Unlimited Potential's mission statement is:

“We will make the world a happier and healthier place to live.”

Its core values are:

- Approachability – friendly and easy to talk to
- Enterprise – innovation, creativity, bold resourcefulness
- Respect – due regard for the feelings or rights of others

The organisation has a series of objectives of which, its impact objectives form a significant part:

- [Well-being]** To support people to lead happier and healthier lives. *Services having positive outcomes for people engaged with them by:*
- Providing high-quality, personal and responsive services that make real improvements to people's lives and communities *[present]*
 - Developing new services that respond to the requirements of customers and clients *[future]*
- [Fulfilment]** To help people who want to develop their skills and abilities to fulfil their potential. *People taking control of their own lives by:*
- Enabling individuals and communities to use their strengths and assets in new ways

³ <http://www.socialenterpriselive.com/se100>

[Positive impact] To be a healthy and happy enterprise that has the best possible impact for people and for a sustainable world. *The organisation having a positive impact on the wider world by:*

- Enterprise: ensuring the sustainability of the organisation's income
- Society: promoting social development that invests in the strengths of everyone
- Economy: helping to create and maintain a strong, sustainable and socially inclusive economy
- Environment: protecting the environment and ensuring prudent use of natural resources

4. Aims & Objectives of the Evaluation

SCOPE

SCC commissioned the evaluation of the LINK Host in Salford in order to help it inform the future commissioning of activities and services.

The evaluation was designed to provide evidence for future strategic planning and commissioning and to enable better communication of the impacts of the work of the Host across a range of stakeholder groups.

The focus for this piece of work was the **LINK Host** service only, not the whole of the LINK in Salford.

OBJECTIVES

The key areas for investigation are:

- How far the Host has enabled the LINK to be more involving, has it supported increases in the numbers and diversity of the local population involved in activities?
- How far has the Host enabled the LINK to influence strategic changes to benefit local changes to health and well-being services in Salford
- What, if any, are the perceived or actual changes in people's knowledge, attitude and behaviours in relation to the activities and their involvement of the Host?

SCC requested that social return on investment (SROI) be used as the main method for the evaluation.

5. Methodology

SROI

SCC's requirement was that SROI methodology was used.

Social Return on Investment – Accounting for Value⁴

Social Return on Investment is a way to measure and account for the value created in an activity or project. Although relatively new, SROI is currently being carried out on a number of projects within third sector organisations, government, funders, investors and commissioners. As well as helping organisations account for their achievements and attract further funding, SROI can also help organisations to maximise their social impact and the improve the lives of people they work with.

SROI works on a framework for measuring and understanding outcomes of an organisation's activity and considers social, economic and environmental outcomes – whilst determining those which stakeholders deem to be most relevant.

SROI was developed from social accounting and cost benefit analysis and has a lot in common with other 'outcomes' approaches. However, SROI is distinct from other approaches in that it places a monetary value on outcomes so that they can be added up and compared with the investment made. This results in a ratio of total benefits (a sum of all the outcomes) to total investments. For example, *an organisation might have a ratio of £4 of social value for every £1 spent on its activities.*

The challenge for this and any SROI-based evaluation is to find corresponding monetary values to represent the changes (good and bad) a project or organisation's activities creates (i.e. the process of monetisation). In the absence of direct or equivalent monetary value, proxies are required and this can be particularly challenging if nationally or locally available financial proxies are not readily available.

There are two types of SROI – evaluative and forecast. This evaluation utilises a forecast methodology and this report will provide detail and outcomes which will predict how much social value will be created if activities meet their intended outcomes. Forecast SROIs are useful at the planning / re-commissioning stages of a project, or if data collected does not lend itself to the undertaking of the evaluative methodology.

Both types of SROI lead to the production of an Impact Map – essentially a table which shows the summation of benefits (outcomes which have been monetised), the deduction of any negatives and adjustments and allowances made in respect of deadweight, attribution and drop-off.

The forecast SROI is based on outcomes in the final year of the Host contract i.e. 2010/11.

RESEARCH UNDERTAKEN

The evaluation included the following activities:

- Desk Research – review of secondary data including programme and individual projects documentation, performance reports and publicity materials
- Depth face-to-face interviews with 'strategic' stakeholders – 4 members of the Performance Review Group i.e. statutory health and social care providers including the commissioner (SCC)

⁴ A guide to Social Return on Investment, Cabinet Office, 2009

- Depth face-to-face interviews with commissioned project managers – 4
- Workshop with 4 members of the LINK Steering Group including the Chair
- Depth face-to-face interviews with Host management – 2
- Presentation and feedback session with Performance Review Group (including Host management team)
- Workshop with Performance Review Group – 3 members including the commissioner (SCC)

DESIGN

The primary research sessions (interviews and workshops) were designed to elicit two types of information:

Firstly for respondents to provide their qualitative feedback on a range of Host performance issues (not necessarily measurable outcomes) including:

- intended (and any unintended) changes emerging from project activity;
- the extent to which the Host has supported the LINK to be more involving;
- the extent to which the Host has enabled the LINK to influence strategic changes to benefit local changes to health and well-being services

Secondly, to ask respondents which aspects of Host activities they feel have a 'value' which matters to them and how / if this can be monetised – this being key to the SROI process.

As such, it was intended that this two-pronged approach would generate important quantitative, experiential / lessons learned style data about Host performance alongside a set of outcomes which could be assessed, prioritised, verified and included in the SROI impact map.

FURTHER DEFINITIONS OF SCOPE

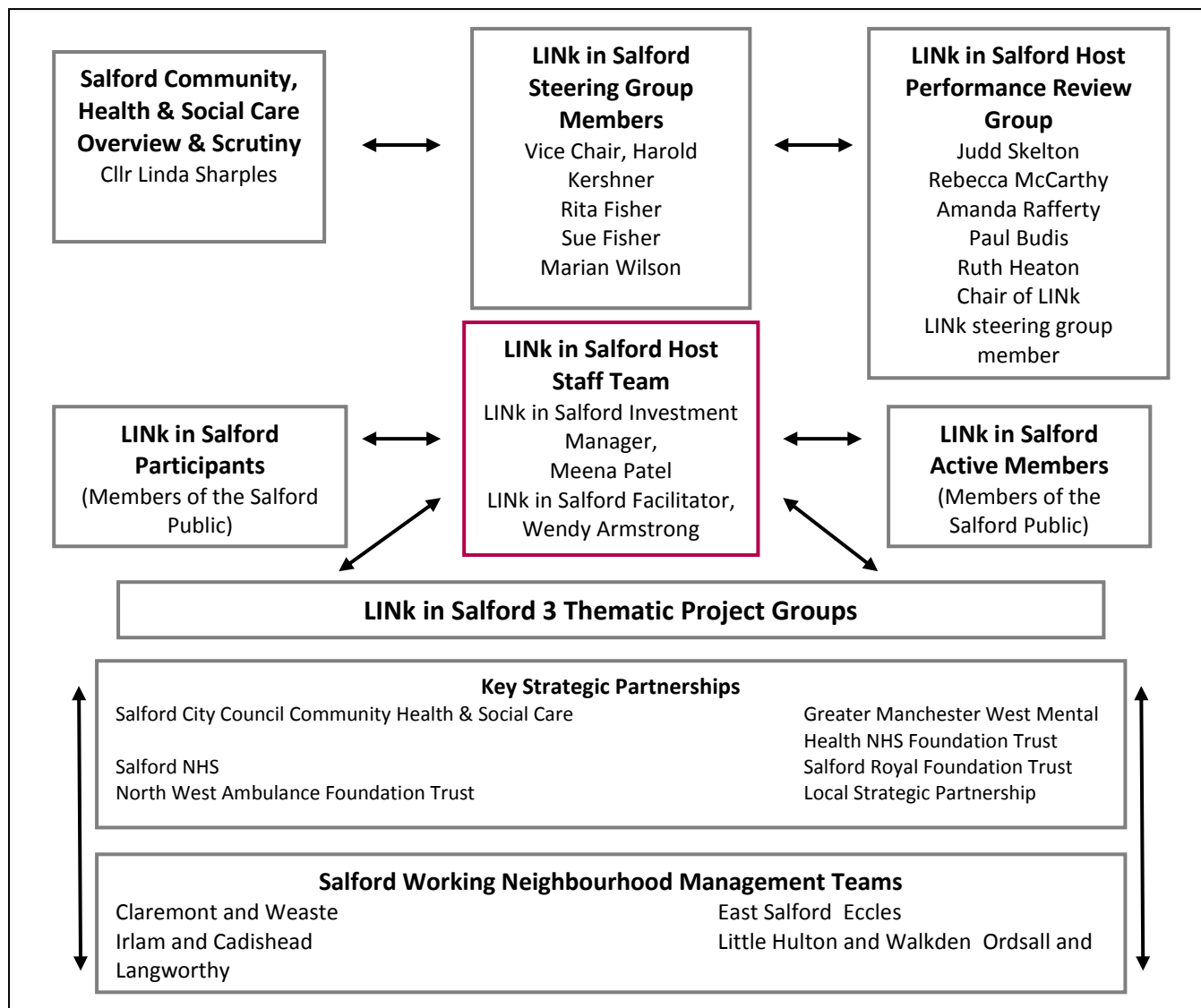
Finally, it is worth reiterating that the forecast SROI is based on outcomes achieved and predicted from the final year (year 3) of the LINK Host contract, and on those outcomes resulting from the performance of the Host alone (and not from broader LINK activities). This presented an additional set of challenges for the evaluators when attempting to make decisions about exactly how much of the value of outcomes was generated (none, part or solely) by activities undertaken by the host i.e. attribution.

LINK Host finance

The total contract value for Host services to the Salford LINK was £378,330.00:

£95.330.00	Year 1	August 2008 - March 2009
£142.000.00	Year 2	April 2009 - March 2010
£140.000.00	Year 3	April 2010 - March 2011

FIGURE 1: LINK IN SALFORD – DIAGRAM OF RELATIONSHIPS



6. The Findings

INTRODUCTION

The following pages contain feedback from each of the respective groups of stakeholders. Each section starts with a summary of general performance-related qualitative data and is followed by respondents’ views on the outcomes / values to be included in SROI analysis.

All interviews and workshops were conducted by experienced, trained University of Salford staff. Respondents were offered total confidentiality – feedback and quotes are therefore anonymised and represent an aggregated set of responses per stakeholder group. Any feedback which could lead to the identification of individual respondents has been removed.

6.1 STRATEGIC STAKEHOLDERS

Referred to as ‘strategic’ stakeholders, this group of respondents was drawn from members of the LINK Performance Review Group. Members are typically those from statutory health care providers and commissioners including the local Hospital Trust, PCT and the commissioner itself, SCC.

Collectively the Performance Review group has responsibility for monitoring the performance of the Host, Unlimited Potential, against a set of KPIs. In addition, members attend to represent their own organisations and are able to take back any issues or concerns from the Host or LINK itself or from findings from the commissioned research projects and hopefully take action in the interests of local people.

Separate in-depth face to face interviews were conducted with:

- Amanda Rafferty, NHS Salford (PCT)
- Leo Clifton, Salford Royal Foundation NHS Trust
- Ruth Heaton, Greater Manchester West NHS Mental Health Trust
- Judd Skelton, Salford City Council (the commissioner of the LINK Host)

POSITIVE FEEDBACK

- ✓ The LINK Host model in Salford has provided strategic stakeholders with an effective mechanism for them to provide context and priorities from their perspectives, advising on policy updates and activities in the area to avoid duplication
- ✓ This process has enabled more effective two-way / 360° sharing of information
- ✓ Taking information away from meetings held by the Host enables stakeholders to promote, disseminate and raise awareness of LINK events and activities
- ✓ Conversely, stakeholders recognise the contribution the LINK Host has made in raising awareness of their respective services
- ✓ Stakeholders would “struggle” to identify public priorities without the Host and to engage with the same number of Salford residents – the Host has the right skills to engage with local people
- ✓ The Host’s pre-existing knowledge of and access to local networks and groups in the third sector meant they could achieve engagement much more effectively the statutory agencies – the Host has been proactive in going out to visit diverse groups and communities
- ✓ The Host has undertaken its project management and facilitation role effectively – the Host is responsible for ensuring projects are commissioned on time, money is spent correctly, administration processes are in place and activities are coordinated. Strategic stakeholders believe these tasks have been “done well” by the Host

“...the outcome is that the Host has developed a much more joined up approach to communicating what is going on in the health and social care sector [in Salford] – the Host has been the ‘driver’ of this ...”

NEGATIVE FEEDBACK / AREAS FOR IMPROVEMENT

- ✗ One respondent reported that reports could have been circulated more quickly and that the Host could have been “smarter about dissemination”
 - 📄 The Host could be more influential in ensuring “more diverse recruitment” to the LINK Steering Group (an opinion of 1 strategic stakeholder)
 - 📄 Timescales commissioning projects were “extremely restrictive” – Host should improve this
 - 📄 In general, stakeholders were not yet sure as to how the Host has enabled the LINK to influence strategic changes to local services
-

“...the research carried out [by commissioned projects] has not influenced policy, at least not yet...”

In summary, the balance of comments from strategic stakeholders reflects a strong belief that the Host performed well in its role of supporting the LINK.

Most notably, repeated references were made to the Host’s skills of:

- networking (specifically, its proactive approach and ability to reach diverse groups)
- communication
- project administration and management

Despite strategic stakeholders readily identifying the skills of the Host, they were less able to articulate how this translated into measurable impact for them as stakeholders or for the organisations they represent – in fact in some ways, respondents felt that whilst the reported improvements in communication amongst partner organisations was of benefit in itself, it did not in reality affect or alter their own individual engagement strategies with local people or service users, with all reporting that their own arrangements would and had continued irrespective of meetings relating to LINK activities. There was certainly no sense at this stage that stakeholders in this group felt that there was evidence to demonstrate the work of the LINK, and by implication, activities of the Host in its support of the LINK, had influenced or led to change in their policies.

Whilst all acknowledged that this was largely due to the fact that it was too early since dissemination of the commissioned research projects, this was not thought to be the only reason – two of the respondents questioned the validity and usefulness of the research topics stating that the subjects were so specific that they could only be of use to a very narrow range of commissioners or providers. One respondent had reservations about the extent to which LINK members were able to influence research topics and questioned the desirability of imposing strict quota and sampling requirements on projects from what they understood was a recent move by the LINK to larger quantitative pieces of work, rather than qualitative investigation into local views as originally agreed and intended. Although not directly criticising the Host, they wondered whether this situation may have been avoided if the LINK Steering Group had received better guidance and a greater “steer” from the Host.

This latter issue highlights one of the key findings from the evaluation: namely, that it becomes difficult to disentangle the outcomes of activities undertaken by the Host and those of the LINK itself – this is discussed in section 9 of this report.

SROI – OUTCOMES & VALUES

Stakeholders reported the following areas as those which had greatest value for them:

Outcome
Improvement in communication amongst strategic stakeholders on local issues and activities
Improved knowledge of local opinions and needs through contact with greater number and more diverse groups and individuals

6.2 MANAGERS OF COMMISSIONED PROJECTS

Respondents in this group were made up of managers / staff from local third sector organisations who had been commissioned to undertake research projects for the LINK.

A total of six projects were commissioned across two calls for proposals. One organisation was successful in winning a commission in both rounds (WealthShare Creation) meaning a potential total of 5 interviews.

Separate in-depth face to face interviews were conducted with:

- Jonathan Kalmus – Healthy Lifestyles project
- Samantha McHale, WealthShare Creation – MyCare project
- Martin Halton, Seedley and Langworthy Trust – Access to Cancer Care project
- Josie Browne (+ 2 project workers), Salford Disability Forum – Access to Cardiovascular Screening Research with Disabled People

POSITIVE FEEDBACK

- ✓ The majority of respondents felt that they had been well supported by the Host and commented in particular on their knowledgeable and approachable staff
 - ✓ Communication between the Host and project managers was felt to be very good initially, with several respondents commenting on the Host's regular contact with them, outside of specific and set monitoring times
 - ✓ Support was given to project managers when requested and at times when the Host asked for additional or amended materials
 - ✓ In most cases, respondents felt that when asked, the Host facilitated conversations and helped to develop relationships between themselves and statutory partners / other relevant organisations
 - ✓ Project administration was efficient with project payments made promptly and as scheduled (which was important for the smaller organisations commissioned)
 - ✓ The initial public consultation event was well organised by the Host and attracted a good attendance by local people as well as providing a lot of useful feedback
-

“... The Host has a good understanding of the client base and the best people to facilitate the LINK. They made our job as a project much easier ...”

NEGATIVE FEEDBACK / AREAS FOR IMPROVEMENT

- ✗ The Host could have been more effective in liaising with various partners organisations – one project had specific difficulties in gaining access to [local services]
 - ✗ One respondent felt that they had to rely heavily on their own relationships and networks and was disappointed with the level of support in this area made by the Host
 - ✗ The Host failed to send accurate briefing documentation during the commissioning process and did not follow up with feedback – one respondent
 - ✗ The Host failed to provide a database of contacts – one respondent
 - 📄 Despite feeling adequately supported throughout the project, several project managers said they doubted that anything would be done with the research
 - 📄 Communication decreased significantly when a member of the Host staff went on long term sick – better cover arrangements should have been in place (mentioned by two respondents)
-

“... We would not have taken on the project if we had known at the time what we were going to be asked to deliver in such a short period of time ...”

In summary, comments from project managers of commissioned projects provide mixed feedback on the role of the LINK Host. It is clear that, with the exception of some specific cases, overall respondents felt well supported by the Host in terms of project administration and relationship management. Comments reflected the strength of the Host with regard to its sound local knowledge and ability to reach a wide range of local groups and interests.

Most notably, involvement with the LINK had led to two significant positive outcomes: firstly that their own individual organisations had benefited from increased profile and additional “exposure”; and secondly that training and support from the Host and from the experience as a whole, had led them to become more ‘tender-ready’.

The more negative comments were reported in the context of arrangements around the commissioning process itself. Respondents in several instances were openly critical of the short turnaround time from being invited to submit proposals to submission deadline and equal negative about some of the stipulations by the LINK relating to project research methodology and sample sizes. Whilst not directly the responsibility of the Host, respondents judged additional requirements of the LINK as unnecessary, unexpected and overly burdensome and as a result the Host was ‘tainted’ by association because it was “carrying out the steering groups bidding”.

Several projects were ultimately despondent at the sense that the research results would not be used (this was felt to be the case by two of the respondents who had delivered research projects in the first round). Whilst action may have been taken, the fact that project managers were not aware of any positive (or otherwise) outcomes is arguably counter-productive in the contribution to confidence in their ability to influence local provision.

SROI – OUTCOMES & VALUES

Project managers reported the following areas as those which had greatest value for them:

Outcome
Increased ‘tender-readiness’
Increased profile through being involved with the LINK
Limited (but some) contribution to securing further projects
Limited contribution to jobs safeguarded (in 1 case)

6.3 LINK STEERING GROUP

A workshop was held with 4 members of the LINK Steering Group, including:

- Royston Futter (Chair)
- Marian Wilson
- Sue Fisher
- Jim Loftus

POSITIVE FEEDBACK

- ✓ Despite initial delays in drafting a constitution, the Host made effective and prompt arrangements to begin the work of and support for the LINK
- ✓ Contact with the Host works well on a day to day basis and formerly once a month when the Steering Group meets prior to a full session with the Host
- ✓ The Host works well to engage with a range of groups, not just the “usual faces”
- ✓ The Host was practical in shaping “woolly” areas for research which emerged from the initial consultation event and defining them more carefully to form the basis of a programme of activity
- ✓ The Steering Group benefits from a range of members which share local knowledge and considerable experience on predecessor and other local groups and committees

NEGATIVE FEEDBACK / AREAS FOR IMPROVEMENT

- ✗ There has been occasions when members of the Steering Group feel that they are being asked to “rubber stamp” decisions already made by the Host
- ✗ Some members of the Steering Group feel like that they would like more support from the Host in order for the LINK to fulfil more of a campaigning role to influence the policy of local health & social care providers
- ✗ Unlimited Potential is considered sometimes as unwilling to be more vocal about issues the LINK feel are of importance
- 📄 The Host should have acted more quickly in recruiting cover for the member of the team who has been absent on sick leave – this has had a detrimental effect on the Host’s ability to support the work of the LINK
- 📄 There still remains room to recruit a more diverse range of people to the Steering Group

Responses gathered during the workshop were essentially complimentary of the Host with all respondents interviewed acknowledging the effort of individual Host staff members. Frustrations were recorded over a perceived lack of willingness on the part of the Host to act in a more campaigning role. Whether this is justified and indeed whether it is one of the Host’s responsibilities may be arguable, nonetheless, members of the Steering Group reported a desire on their part to issue more press releases and raise greater awareness of health inequalities amongst local people to a wider audience.

SROI – OUTCOMES & VALUES

Outcome
[none reported material to SROI]

6.4 HOST MANAGEMENT

Depth interviews with Host staff, LINK in Salford Investment Manager, Meena Patel and CEO of Unlimited Potential, Chris Dabbs recorded the following suggested outcomes for consideration in the SROI calculation:

SROI – OUTCOMES & VALUES

Outcome	Indicator / comments and potential proxies
Local People & Communities	<ul style="list-style-type: none"> • value of participation by local people who would otherwise have been involved; • value of voices being influential that might not otherwise be heard (community engagement events and annual events facilitated / arranged by LINK Host); • value of information and advice disseminated by LINK Host that would not otherwise have been received
Steering Group Members	<ul style="list-style-type: none"> • social benefits and economic benefits (?) to individuals of support, learning and development (including training) enabled by LINK Host, which they would otherwise not have received
Key Partner Organisations	<ul style="list-style-type: none"> • value of working relationships through LINK Host that would not otherwise exist
Commissioned Organisations	<ul style="list-style-type: none"> • social value of specific voices being heard; • additional income within local economy (local multiplier effect?); • jobs created / maintained; • new or enhanced skills, knowledge and experience that would not otherwise have existed, especially in relation to new economy, and commissioning and procurement process (rather than traditional grants); • higher profile / marketing; • value of support and advice from LINK Host; • value of capacity-building; • value of PQASSO and equivalent (e.g., allows organisation to be on Approved Providers list)
Unlimited Potential	<ul style="list-style-type: none"> • added value created through using a social enterprise as LINK Host (rather than a "traditional" voluntary organisation), especially one that can demonstrate added social, economic and environmental value (cf. audited social accounts, attached); • economic and social value of using a Salford-based LINK Host, which would not have accrued from one based elsewhere; • improved viability of a local enterprise; • added value from having a medium-sized organisation as LINK Host, with greater stability and interaction with other community-based services that engage a wide range of people across Salford

7. SROI Calculation & Impact Map

Interim findings and preliminary outcomes from the primary research undertaken throughout the evaluation were discussed and verified in a session with the Performance Review Group. Subsequently, with several stakeholders in a workshop, the following list of refined outcomes was produced to be included in the Impact Map.

Corresponding outcome indicators and suitable financial proxies (where available) were formulated by the University's evaluation team based on a synthesis of the consultations with the various stakeholder groups, considerable desk research and by attending accredited SROI Practitioner Training (as approved by The SROI Network⁵).

The list also includes outcomes for which there are currently no proxies and where impacts are at this stage, too early to forecast. They remain legitimate for inclusion however and help demonstrate that the Host has and is likely to return value over and above those things which currently can be monetised.

TABLE 1: SROI IMPACT MAP

Stakeholder	Outcome	Indicator	Mapped
Commissioner (SCC)	Improved knowledge of local residents' health & social care needs	Costs saved on large scale public opinion survey (quarterly panel survey)	✓
	<i>Efficiencies made by new commissioning choices (contribution of Host to enabling LINK objectives through commissioned projects)</i>		
Commissioned organisations	Improved chance of winning commissions	Contracts secured	✓
	Profile raised	Reduced spending on marketing & PR	✓
	Jobs safeguarded	Posts sustained	✓
	Improved knowledge of local residents' health & social care needs	Cost saved from alternative client surveys / engagement / consultation	✓
	<i>Contribution local commissioned organisations make to local economy</i>		
Key partner organisations (strategic stakeholders)	Improved knowledge; effectiveness / skills	Costs of training programme	✓
	<i>Efficiencies made by new commissioning choices (contribution of Host to enabling LINK objectives through commissioned projects)</i>		
LINK active members (27)	<i>Personal (and professional) value and benefit to members</i>		
LINK passive members (500)	<i>Personal (and professional) value and benefit to members</i>		
Local residents	<i>Benefit of improved / access to local services</i>		
	<i>Benefit of local residents feeling they have a 'stronger voice' / can influence decisions (Promoting Inclusion IN Salford: Pledge Five)</i>		

⁵ <http://www.thesroinetwork.org/content/view/101/98/>

TABLE 2: SROI IMPACT MAP

Stage 1		Stage 2			Stage 3							
Stakeholders	Intended/unintended changes	Inputs		Outputs	The Outcomes (what changes)							
Who do we have an effect on? Who has an effect on us?	What do you think will change for them?	What do they invest?	Value £	Summary of activity in numbers	Description	Indicator	Source	Quantity	Duration	Financial Proxy	Value £	Source
					How would you describe the change?	How would you measure it?	Where did you get the information from?	How much change was there?	How long does it last?	What proxy would you use to value the change?	What is the value of the change?	Where did you get the information from?
Local Authority (SCC) – Host commissioner	Host will enable delivery of LINK objectives	Year 3 contract	£140,000									
	Knowledge of local needs			Consultations; interviews; conversations; meetings; drop-ins etc	Improved knowledge of local residents' health & social care needs	Costs saved on large scale public opinion survey (quarterly panel survey)	Primary research (in total)	1	3	Market research fieldwork costs – agency	£32,000	Av industry rates (source 2)
Commissioned organisations (projects)	Local third sector organisations have 'capacity built'			Receive training; access to networks; experience contract delivery; interaction with local partners / agencies	Improved chance of winning commissions	Contracts secured	Depth interview	6	5	The average value of contracts won	£20,000	Reported
					Profile raised	Reduced spending on marketing & PR	Depth interview	5	5	Average cost of PR & Comms package	£3,600	Av industry rates (source 1)
					Jobs safeguarded	Posts sustained	Depth interview	1	1	FTE Salary + on-costs	£10,000	Reported
Key partner organisations (strategic stakeholders)	Knowledge of local needs and partner activity			Attend qtrly performance review group	Improved knowledge of local residents' health & social care needs	Cost saved from alternative client surveys / engagement / consultation	Workshop	3	2	Market research fieldwork costs – agency	£25,000	Av industry rates (source 2)
LINK Steering Group	Improved effectiveness as Board	Volunteer hrs @ min wage		Attend board dev training	Improved knowledge; effectiveness / skills	Costs of training programme	Desk research	1	2	Costs of consultant / trainer	£2,500.00	Co-op College / similar
TOTAL			£140,000									

Duplicated/		Stage 4				
Stakeholders	Indicator	Deadweight %	Displacement %	Attribution %	Drop-off %	Impact %
Who do we have an effect on? Who has an effect on us?	How would you measure it?	What would have happened without the activity?	What activity did you displace?	Who else contributed to the change?	Does the outcome drop of in future years?	Quantity times financial proxy, less deadweight, displacement and attribution
Local Authority (SCC) – Host commissioner	Costs saved on large scale public opinion survey (quarterly panel survey)	10	0	20	60	£23,040.00
Commissioned organisations (projects)	Contracts secured	50	10	25	33	£40,500.00
	Reduced spending on marketing & PR	33	0	25	33	£9,045.00
	Posts sustained	0	0	0	100	£10,000.00
Key partner organisations (strategic stakeholders)	Cost saved from alternative client surveys / engagement / consultation	10	10	20	60	£48,600.00
LINK Steering Group	Costs of training programme	10	0	15	33	£1,912.50
						£133,097.50
		Present Value of each year (after discounting)				
		Total present value (PV)				
		Net present value (PV minus the investment)				
		Social Return £ per £				

Stage 5				
Calculating Social Return				
Discount Rate				
Year 1 (After activity)	Year 2	Year 3	Year 4	Year 5
£23,040.00	£9,216.00	£3686.40	£0	£0
£40,500.00	£27,135.00	£18,180.45	£12,180.90	£8,161.20
£9,045.00	£6,060.15	£4,060.30	£2,720.40	£1,822.67
£10,000.00	£0	£0	£0	£0
£48,600.00	£19,440.00	£0	£0	£0
£1,912.50	£0	£0	£0	£0
£133,097.50	£63,132.53	£25,927.15	£14,901.30	£9,983.87
£128,596.62	£58,934.89	£23,384.80	£12,985.62	£8,406.15
				£232,308.09
				£92,308.09
				£1.66

8. Conclusions & Recommendations

Completing the evaluation on the LINK Host has been challenging in two ways: firstly in attempting to disentangle those outcomes which can be attributed to Host actions from those emerging from broader LINK activity (which on some occasions could lead to artificial delineation); and secondly, the test of applying SROI methodology to activity which is for the most part about 'capacity building', and for which finding financial proxies can be more difficult.

Notwithstanding these challenges, the research undertaken during the evaluation has produced some clear findings both from qualitative feedback and in trying to estimate the social return of Host activity.

GENERAL – CONCLUSIONS FROM LESSONS LEARNED FEEDBACK

- Feedback from strategic stakeholders recognised Unlimited Potential's strength in the local area and its ability to network and communicate with partners and the third sector alike
- In particular, strategic stakeholders commended the Host's ability to reach out and engage with hard-to-reach and diverse groups – something which was believed to have played a significant part in the successful undertaking of its role
- Several respondents in this group were confident that it would have been difficult to a local organisation (or internal solution) which could have achieved the same level of engagement and that Unlimited Potential's established position in the community and ready access to groups and contacts proved invaluable
- Feedback from commissioned organisations was similarly positive. They praised the support they had received, noting the important assistance they received in introductions to strategic partners in the course of develop research briefs
- Respondents all felt that the Host's project management and professional approach to administration had led to the smooth running of project activities and achievement of project milestones
- Project staff singled out timely project payments and in particular the friendly and professional approach of Meena Patel and Wendy Armstrong
- Project respondents were likely to express most concern or suggest areas for improvement when considering issues of how local organisations were commissioned, research project specification & methodology and the ultimate usefulness or likelihood of research findings from the commissioned projects influencing policy / delivery
- Whilst these issues were not specifically the responsibility of the Host, respondents from the commissioned organisations were understandably, not always ready to

make such distinctions and judgements tended to be made in reference to the LINK as a single entity

- An apparent 'creative tension' between the Host and LINK has in the main, been positive and productive, however respondents from several stakeholder groups suggested that the LINK required careful management and guidance to ensure proposed activities matched the needs raised during public consultation
- Overall, although the evaluation scope did not include a comparative analysis of other LINK management arrangements, qualitative feedback recorded a consistent belief from all strategic stakeholders and other respondents that the LINK Host arrangements in Salford were certainly an example of good practice, and more than likely, to be regarded as 'innovative' nationally – the Host was seen overwhelmingly as having made this happen

SROI OUTCOMES & IMPACT

SROI has its limitations. Both as an evaluation methodology in itself and when applied during this evaluation, its approach to accounting for value is not perfect and not static. As SROI becomes more widely used the availability and breadth of suitable financial proxies to express value emerging from projects will improve.

In this instance, SROI provides a best estimate and forecast of the social return on investment generated by the Host. This report highlights the difficulties of attribution and the challenges experienced by the stakeholders involved when trying to pin down and articulate exactly what value and impacts they have received as a result of interacting with the Host. These issues are not specific to this evaluation and are commonly faced by those undertaking SROI and in fact, any rigorous cost-benefit analysis procedure.

Care has been taken in this evaluation not to exaggerate the value emerging from outcomes delivered by the Host. Consequently, the SROI calculation is conservative and likely underestimate value. Additionally, there are clearly areas which are not included in the calculations where value has and will be created, again leading to undercounting. On balance, some of the assumptions made in the impact map are provisional, and can and should be reviewed as more relevant and real-time data becomes available.

Nonetheless, this evaluation has produced a set of outcomes which can be confidently presented as those which stakeholders report as representing what matters most to them i.e. of greatest value.

- A figure of £1.66 is returned i.e. estimates suggest **for every £1 invested in the LINK Host, £1.66 of social value is created in Salford**, especially for local third sector organisations
- For these reasons, the **social return calculations likely underestimate the true social value** created by the LINK Host

- Even slight adjustment to values and some of the assumptions used in the calculations (i.e. a realistic scenario) sees the social return figure increase to £2.03. On this basis it is legitimate and helpful to express the social value as something likely to be in a band of £1.66 to £2.03
- Of interest is that 44% of the social value returned is generated by activities which support the commissioned organisations, reinforcing the importance of the support given to this stakeholder group

RECOMMENDATIONS

- SCC and the Host should consider how over time, systems can be improved to ensure the collation of data which will lead to continuing improvements in the calculation of SROI
- Given the proportion of social return resulting from support to the commissioned projects, it is critical that the Host and Host commissioner ensure that there is clarity between what is expected of the Host and that of the LINK Steering Group – it is this area where, rightly or wrongly, the Host has been judged for perceived inconsistencies in communication (particularly at commissioning time)

9. Glossary

Attribution	An assessment of how much of the outcome was caused by the contribution of other organisations or people.
Deadweight	A measure of the amount of outcome that would have happened even if the activity had not taken place.
Discounting	The process by which future financial costs and benefits are recalculated to present-day values.
Discount rate	The interest rate used to discount future costs and benefits to a present value.
Displacement	An assessment of how much of the outcome has displaced other outcomes.
Drop-off	The deterioration of an outcome over time.
Duration	How long (usually in years) an outcome lasts after the intervention, such as length of time a participant remains in a new job.
Impact	The difference between the outcome for participants, taking into account what would have happened anyway, the contribution of others and the length of time the outcomes last.
Impact Map	A table that captures how an activity makes a difference: that is, how it uses its resources to provide activities that then lead to particular outcomes for different stakeholders.
Inputs	The contributions made by each stakeholder that are necessary for the activity to happen.
Materiality	Information is material if its omission has the potential to affect the readers' or stakeholders' decisions.
Monetise	To assign a financial value to something.
Net present value	The value in today's currency of money that is expected in the future minus the investment required to generate the activity.
Outcome	The changes resulting from an activity. The main types of change from the perspective of stakeholders are unintended (unexpected) and intended (expected), positive and negative change.
Outputs	A way of describing the activity in relation to each stakeholder's inputs in quantitative terms.

Outcome indicator	Well-defined measure of an outcome.
Payback period	Time in months or years for the value of the impact to exceed the investment.
Proxy	An approximation of value where an exact measure is impossible to obtain.
Sensitivity analysis	Process by which the sensitivity of an SROI model to changes in different variables is assessed.
Social return ratio	Total present value of the impact divided by total investment.
Stakeholders	People, organisations or entities that experience change, whether positive or negative, as a result of the activity that is being analysed.