Canadian Housing and Renewal Association

CHRA ACHRU

A Home for the Housing Sector

Social Return on Investment (SROI): Making the Case for Housing

Stephanie Robertson, Founder & CEO, SiMPACT Strategy Group

January 28, 2016

Introductions

SiMPACT Strategy Group

The Highest Standard in Community Investment.

LBG CANADA

Network of Professionals

Portfolio & Project Performance Measurement

Leadership in Reporting & Communications

Social Value Creation, Measurement & Evaluation

- Social Return on Investment (SROI)
- Community investment measurement & evaluation
- CI/CSR management systems
- Education & skill development across social-purpose organizations

SiMPACT Strategy Group is a founding Network Partner of: SROI CANADA

Recent SROI Work

47 case studies
88 SCIF projects
23 customized training sessions
SROI Canada Development

Training
Analysis

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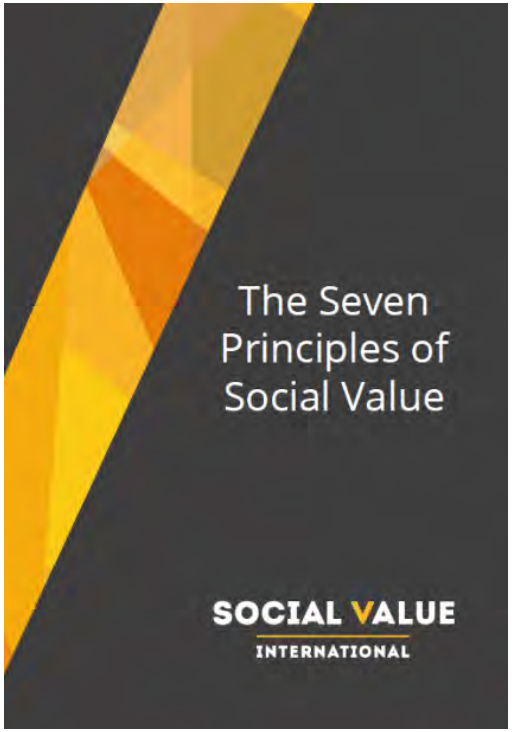
Social Value Creation – What Do We Mean? How Do We Measure it?

An Account of Social Value

An **account of social value** is a story about the changes experienced by people. It includes qualitative, quantitative and comparative information, and also includes environmental changes in relation to how they affect people's lives.



www.socialvalueint.org

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SROI is One Approach

"SROI measures change in ways that are relevant to the people or organizations that experience or contribute to it.

It tells the story of how change is being created by measuring social, environmental and economic outcomes and uses monetary values to represent them. This enables a ratio of benefits to costs to be calculated."

Nicholls *et al.* *A Guide to Social Return on Investment*. (April 2009: Office of the Third Sector): 8

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Social Value Creation

- Community cohesion
- Education
- Quality of life
- Confidence
- Environmental improvement
- Job prospects
- Personal networks
- Sense of inclusion
- Improved health, so many others…….

Direct

(the target stakeholder)

or

Indirect

(stakeholders who change as a result of the target stakeholder's changes)

Fundamental Questions

Measurement

- What or who changes?
- How does it/do they change?
- How can the change be measured?
- Would something else have changed if this change did not happen?

Valuation (SROI)

- What is the value of the change?
- Who is affected by the change?
- Is 100% of the change because of us?

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An SROI is ....

- A **framework** to gather investment information, evaluation results and describe what occurred as a result
- A **method** to ensure that the story of social value creation is presented in terms that a cross-section of interests can understand
- Constructed upon the framework of an **outcomes** model
- Necessary if social value is to be presented in relation to environmental and financial value

An SROI is not ....

- A calculator
- A tool for comparison of programs based on return ratios
- A replacement for evaluation tools (it is an information framework)
- Useful for every investment or situation
- Difficult, as long as the guiding logic model and outcomes framework are clear, and an evaluation system is either in place or envisaged

SROI Steps

#	SROI Step	Description
1.	**Establishing Scope and identifying stakeholders:**	Develop Theory of Change summary statement, consider timeframe, determine scope
2.	**Mapping Outcomes**:	Consider what *changes* and what the alternative would have been
3.	**Evidencing outcomes and giving them a value**:	Find appropriate indicators and financial proxies
4.	**Establishing Impact**:	Discount for attribution, deadweight, displacement, drop-off
5.	**Calculating the SROI**:	Determine the SROI ratio
6.	**Reporting, using, and embedding**:	Communicate the results, continue development, enhance practice

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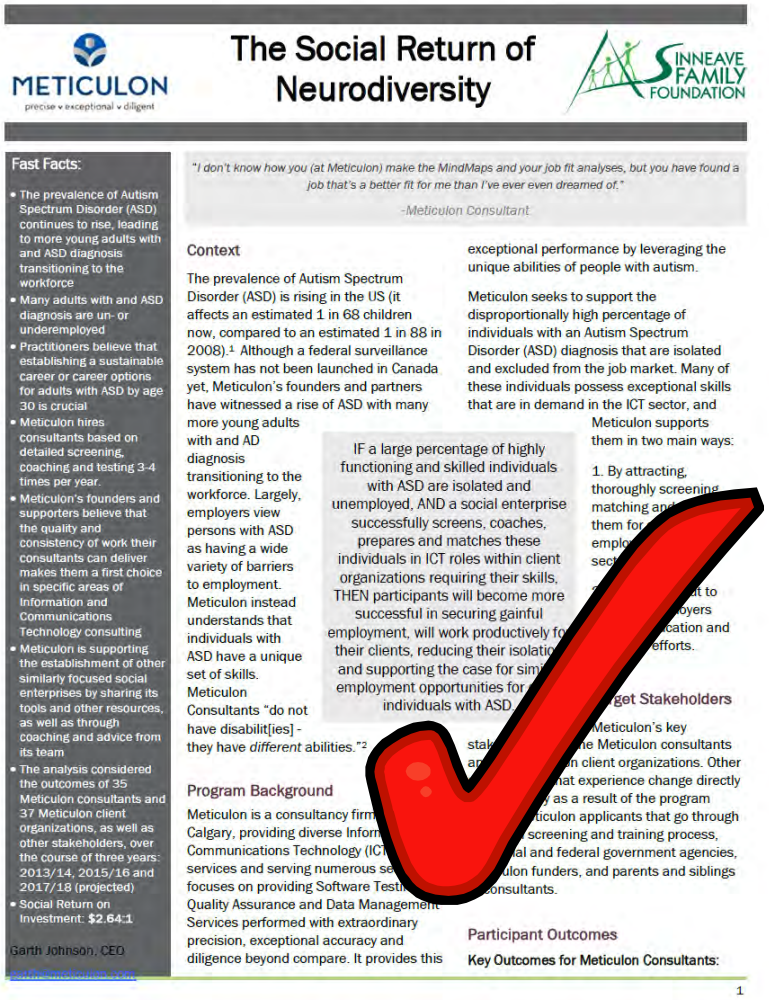
...a Story Not a Number

$$\frac{\text{Total value}}{\text{Total Input}} = \text{SROI Ratio}$$

Year of Analysis	SROI Ratio
2013/14	$2.17 : $1
2015/16	$5.11 : $1
2017/18	$1.86 : $1
TOTAL:	$2.64 : $1



METICULON
precise v exceptional v diligent

The Social Return of Neurodiversity

SINNEAVE FAMILY FOUNDATION

Fast Facts:

- The prevalence of Autism Spectrum Disorder (ASD) continues to rise, leading to more young adults with and ASD diagnosis transitioning to the workforce
- Many adults with and ASD diagnosis are un- or underemployed
- Practitioners believe that establishing a sustainable career or career options for adults with ASD by age 30 is crucial
- Meticulon hires consultants based on detailed screening, coaching and testing 3-4 times per year.
- Meticulon's founders and supporters believe that the quality and consistency of work their consultants can deliver makes them a first choice in specific areas of Information and Communications Technology consulting
- Meticulon is supporting the establishment of other similarly focused social enterprises by sharing its tools and other resources, as well as through coaching and advice from its team
- The analysis considered the outcomes of 35 Meticulon consultants and 37 Meticulon client organizations, as well as other stakeholders, over the course of three years: 2013/14, 2015/16 and 2017/18 (projected)
- Social Return on Investment: **$2.64:1**

Garth Johnson, CEO

"I don't know how you (at Meticulon) make the MindMaps and your job fit analyses, but you have found a job that's a better fit for me than I've ever even dreamed of."

-Meticulon Consultant

Context

The prevalence of Autism Spectrum Disorder (ASD) is rising in the US (it affects an estimated 1 in 68 children now, compared to an estimated 1 in 88 in 2008).[1] Although a federal surveillance system has not been launched in Canada yet, Meticulon's founders and partners have witnessed a rise of ASD with many more young adults with and AD diagnosis transitioning to the workforce. Largely, employers view persons with ASD as having a wide variety of barriers to employment. Meticulon instead understands that individuals with ASD have a unique set of skills. Meticulon Consultants "do not have disabilit[ies] - they have *different* abilities."[2]

IF a large percentage of highly functioning and skilled individuals with ASD are isolated and unemployed, AND a social enterprise successfully screens, coaches, prepares and matches these individuals in ICT roles within client organizations requiring their skills, THEN participants will become more successful in securing gainful employment, will work productively fo their clients, reducing their isolatio and supporting the case for sim employment opportunities for individuals with ASD

Program Background

Meticulon is a consultancy firm Calgary, providing diverse Inform Communications Technology (ICT services and serving numerous se focuses on providing Software Testi Quality Assurance and Data Management Services performed with extraordinary precision, exceptional accuracy and diligence beyond compare. It provides this exceptional performance by leveraging the unique abilities of people with autism.

Meticulon seeks to support the disproportionally high percentage of individuals with an Autism Spectrum Disorder (ASD) diagnosis that are isolated and excluded from the job market. Many of these individuals possess exceptional skills that are in demand in the ICT sector, and Meticulon supports them in two main ways:

1. By attracting, thoroughly screening matching an them for emplo sect

t to oyers cation and efforts.

get Stakeholders

Meticulon's key he Meticulon consultants n client organizations. Other hat experience change directly as a result of the program ticulon applicants that go through screening and training process, al and federal government agencies, ulon funders, and parents and siblings consultants.

Participant Outcomes

Key Outcomes for Meticulon Consultants:

1

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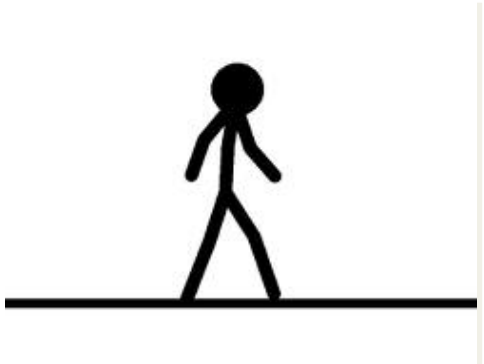
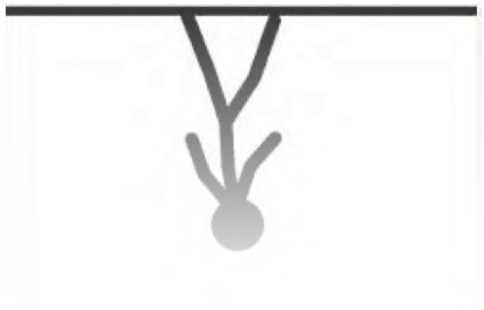
Social Value Creation in the Context of Housing

Outcomes are the Foundation

Intervention (activity) >  > Outcome (change experienced by participants)

No Intervention (activity) >  > Alternative Outcome (what would have happened if you hadn't intervened)

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Outcome Mapping Exercise ....

SiMPACT SROI Workbook

SiMPACT Strategy Group

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Stakeholders	Activities	Outputs	Illustrating Outcomes				
			Outcomes	Indicator	Indicator Source	Alternate Outcome	Valuing
Pregnant and parenting women 16-29 with possible mental health, addiction, abuse, housing, and/or financial issues	Provision of secure housing with supports (food, clothing, shelter)	# women attending Length of stay	Increased housing stability/decreased homelessness	# women coming from unstable housing situations or homelessness	Admission survey	Women would experience housing instability or homelessness. They would be exposed to violence, crime, health issues, negative influences, etc.	Cost of moving/storage Cost of pain and suffering due to sexual assault (danger on the streets)
			Decreased exposure to domestic violence	# women leaving domestic violence on intake	Admission survey	Women would not have any other place to go and would stay in violent situations, leading to increased injuries, addictions, and other negative effects of DV.	Personal costs associated with DV (e.g. counselling services) Cost of pain and suffering due to assault
	Support for addressing addictions (referrals, methadone planning, etc.)	# women addressing addictions	Decreased substance use	# women reducing substance use	Admission and Exit surveys	Women would continue or escalate substance use, their children may end up in care, their lives would be less stable, their health would be poorer	Personal costs associated with addiction
			Better physical health of mother	# women pursuing healthy lifestyles (e.g. decreased smoking)	Admission and Exit surveys	Women continue or develop unhealthy behaviours and suffer negative health effects are a result.	Revealed preference – value of gym membership? Nutrition related costs (healthy food, vitamins, etc.) Value of proper sleep?
	Basic needs support	# medications, transport, clothing, meals etc. provided	Increased access to necessities and personal resources freed up from buying necessities	# women accessing basic needs support that they would otherwise have to pay for themselves	Program data	Women would have to pay for basic necessities or would have to go without or go into debt if they did not have the money to pay for it themselves. Some women may turn to criminal activity for survival.	Value of things provided (food, clothes, baby supplies, etc.)
	Provision of psycho social		Increased self esteem and				

Start Page | 1. SROI Scope | 2. Theory of Change - Summary | 3. Illustrating Outcomes | 4. Valuing Outcomes | 5. Year 1 | 7. SROI Calculation Summary | Notes Year1 | 5. Year 2 | Notes Year2 | 5. Year 3

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First Steps: Housing & Support for Mothers Fleeing Domestic Violence

Social Return on Investment (SROI)

first steps housing project inc.

Funded by the Government of Canada's Homelessness Partnering Strategy — Canada

I don't even want to picture where I'd be without this place. I know I wouldn't have my child. - Program participant

FAST FACTS

SROI Overview:
For every dollar invested in First Steps Housing Project Inc., approximately **$6** is created in social value. The **return to government is $1.50** for every dollar invested in the program.

Program Components:
- First Steps Residence
- Second Steps Apartment Program
- Dr. Christine Davies Education Centre
- Child Development Centre

March 2012-March 2014:
- 47 unique participants
- 4 repeat participants
- Average length of stay; 9 months
- Average age at intake; 20
- 40 previously exposed to abuse
- 24 lived on the street previously
- 14 graduated high school
- 22 increased bond with their child
- 24 children living with participants
- 16 children would have otherwise been placed in foster care
- 4 children reunited with their mothers after foster care

Contact:
Sharon Amirault, *Executive Director*
First Steps Housing Project Inc.
P: 506-693-2228
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info@firststepshousing.com
www.firststepshousing.com

First Steps Programming

First Steps provides a safe and healthy environment that supports pregnant and parenting young women and their children, who have no safe place to live. These women have experienced significant trauma and instability throughout their lives. Participants find themselves, and by consequence their children, caught in the cycle of poverty. First Steps helps break this cycle.

Social Return on Investment (SROI)

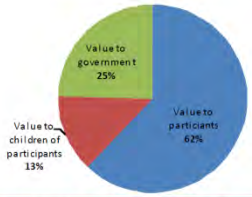
Based on program statistics from March 2012 until March 2014, First Steps created approximately $6 in social value for every dollar invested in the program.

This value was created for the participants and their children, as well as the government as they are often high service users.

For government a return of $1.50 is created for every dollar invested. The table to the right indicates some government values included in the analysis. The ratio, however, is a conservative demonstration of First Step's social value creation as some elements of social change may never be fully expressed in financial terms.

Financial Valuation for Government
Cost per homeless family per year
Cost per domestic violence victim
Cost of substance abuse
Cost of child born with Fetal Alcohol Spectrum Disorder (FASD)
Yearly additional health care costs - premature child
Neonatal hospital costs
Health costs associated with lack of vitamins (poor nutrition) during pregnancy
Hospital treatment of mental health concerns
Social assistance (1 adult + 1 child), Prenatal benefit, Child tax benefit, GST rebate (resources used by participants)
Public cost of dropping out of high school
Cost of child in foster care

First Steps Social Value Creation Breakdown by Stakeholder Group



If I hadn't had the opportunity here I would have been dead – I would have gave up on life. - Program participant

SROI analysis conducted in partnership with: SiMPACT Strategy Group
www.simpactstrategies.com
403-444-5683

The opinions and interpretations in this publication are those of the author and do not necessarily reflect those of the Government of Canada.

Outcomes for mothers:

- Increased housing stability/decreased homelessness
- Decreased exposure to domestic violence
- Decreased substance use
- Better physical health of mother
- Increased income/financial stability

Outcomes for Government:

- Fewer homeless individuals using support systems
- Decreased number of domestic violence cases seen in hospitals and justice system
- Decreased substance abuse and related crime, health service use, etc.
- Better physical health of mother leading to fewer health services used on an ongoing basis
- Increased income assistance use

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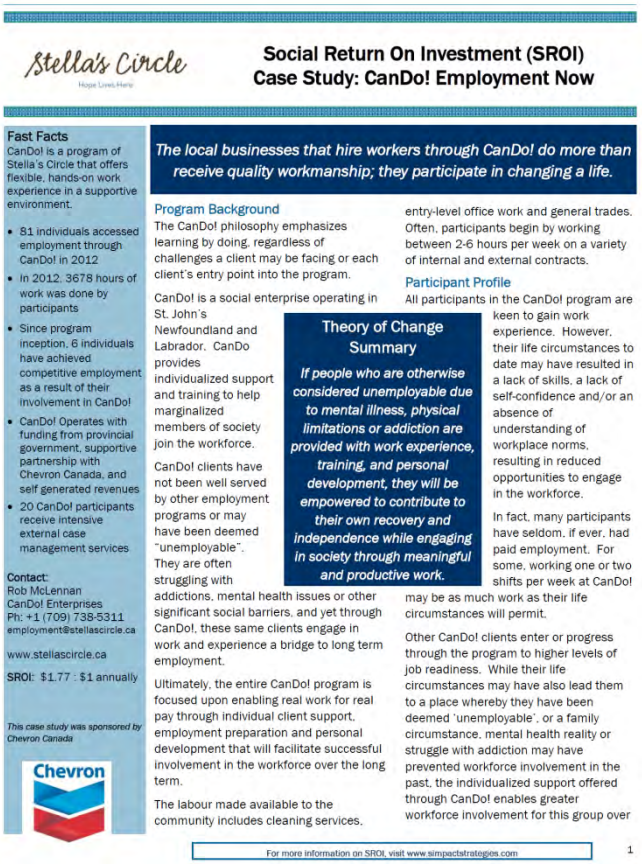
CanDO! Employment Now Stable Housing is an Outcome Linked to Employment



Stella's Circle
Hope Lives Here

Social Return On Investment (SROI)
Case Study: CanDo! Employment Now

Fast Facts
CanDo! is a program of Stella's Circle that offers flexible, hands-on work experience in a supportive environment.

- 81 individuals accessed employment through CanDo! in 2012
- In 2012, 3678 hours of work was done by participants
- Since program inception, 6 individuals have achieved competitive employment as a result of their involvement in CanDo!
- CanDo! Operates with funding from provincial government, supportive partnership with Chevron Canada, and self generated revenues
- 20 CanDo! participants receive intensive external case management services

Contact:
Rob McLennan
CanDo! Enterprises
Ph: +1 (709) 738-5311
employment@stellascircle.ca

www.stellascircle.ca

SROI: $1.77 : $1 annually

This case study was sponsored by Chevron Canada

Chevron

The local businesses that hire workers through CanDo! do more than receive quality workmanship; they participate in changing a life.

Program Background
The CanDo! philosophy emphasizes learning by doing, regardless of challenges a client may be facing or each client's entry point into the program.

CanDo! is a social enterprise operating in St. John's Newfoundland and Labrador. CanDo provides individualized support and training to help marginalized members of society join the workforce.

CanDo! clients have not been well served by other employment programs or may have been deemed "unemployable". They are often struggling with addictions, mental health issues or other significant social barriers, and yet through CanDo!, these same clients engage in work and experience a bridge to long term employment.

Ultimately, the entire CanDo! program is focused upon enabling real work for real pay through individual client support, employment preparation and personal development that will facilitate successful involvement in the workforce over the long term.

The labour made available to the community includes cleaning services, entry-level office work and general trades. Often, participants begin by working between 2-6 hours per week on a variety of internal and external contracts.

Theory of Change Summary
If people who are otherwise considered unemployable due to mental illness, physical limitations or addiction are provided with work experience, training, and personal development, they will be empowered to contribute to their own recovery and independence while engaging in society through meaningful and productive work.

Participant Profile
All participants in the CanDo! program are keen to gain work experience. However, their life circumstances to date may have resulted in a lack of skills, a lack of self-confidence and/or an absence of understanding of workplace norms, resulting in reduced opportunities to engage in the workforce.

In fact, many participants have seldom, if ever, had paid employment. For some, working one or two shifts per week at CanDo! may be as much work as their life circumstances will permit.

Other CanDo! clients enter or progress through the program to higher levels of job readiness. While their life circumstances may have also lead them to a place whereby they have been deemed 'unemployable', or a family circumstance, mental health reality or struggle with addiction may have prevented workforce involvement in the past, the individualized support offered through CanDo! enables greater workforce involvement for this group over

For more information on SROI, visit www.simpactstrategies.com

1

Outcomes for participants:

- Live in a safe and secure home
- Improved physical health
- Improved energy, sense of well being
- Enhanced addictions recovery
- Improved mental health management

Employers:

- Save resources attracting and recruiting people to fill contracts

Provincial Departments:

- Increase the labour market participation of employable persons, particularly those reliant on public income supports

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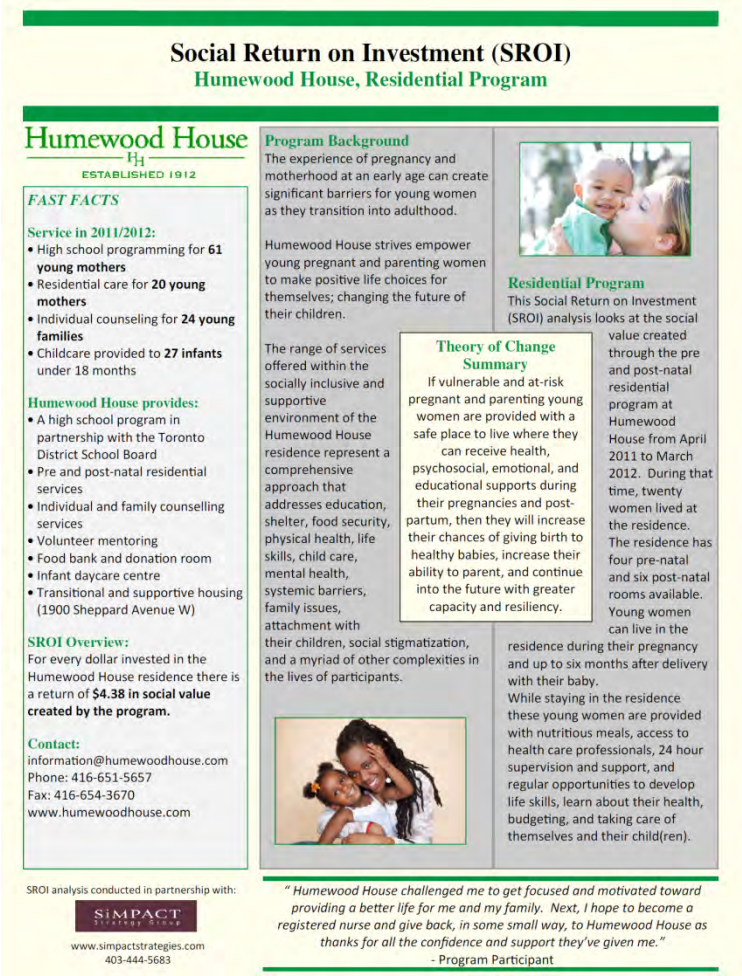
Humewood House: Housing & Support for Pregnant Teens & Teen Mothers



Social Return on Investment (SROI)

Humewood House, Residential Program

Humewood House
ESTABLISHED 1912

FAST FACTS

Service in 2011/2012:
- High school programming for **61 young mothers**
- Residential care for **20 young mothers**
- Individual counseling for **24 young families**
- Childcare provided to **27 infants** under 18 months

Humewood House provides:
- A high school program in partnership with the Toronto District School Board
- Pre and post-natal residential services
- Individual and family counselling services
- Volunteer mentoring
- Food bank and donation room
- Infant daycare centre
- Transitional and supportive housing (1900 Sheppard Avenue W)

SROI Overview:
For every dollar invested in the Humewood House residence there is a return of **$4.38 in social value created by the program.**

Contact:
information@humewoodhouse.com
Phone: 416-651-5657
Fax: 416-654-3670
www.humewoodhouse.com

Program Background
The experience of pregnancy and motherhood at an early age can create significant barriers for young women as they transition into adulthood.

Humewood House strives empower young pregnant and parenting women to make positive life choices for themselves; changing the future of their children.

The range of services offered within the socially inclusive and supportive environment of the Humewood House residence represent a comprehensive approach that addresses education, shelter, food security, physical health, life skills, child care, mental health, systemic barriers, family issues, attachment with their children, social stigmatization, and a myriad of other complexities in the lives of participants.

Theory of Change Summary
If vulnerable and at-risk pregnant and parenting young women are provided with a safe place to live where they can receive health, psychosocial, emotional, and educational supports during their pregnancies and post-partum, then they will increase their chances of giving birth to healthy babies, increase their ability to parent, and continue into the future with greater capacity and resiliency.

Residential Program
This Social Return on Investment (SROI) analysis looks at the social value created through the pre and post-natal residential program at Humewood House from April 2011 to March 2012. During that time, twenty women lived at the residence. The residence has four pre-natal and six post-natal rooms available. Young women can live in the residence during their pregnancy and up to six months after delivery with their baby.
While staying in the residence these young women are provided with nutritious meals, access to health care professionals, 24 hour supervision and support, and regular opportunities to develop life skills, learn about their health, budgeting, and taking care of themselves and their child(ren).

SROI analysis conducted in partnership with:
SiMPACT Strategy Group
www.simpactstrategies.com
403-444-5683

" Humewood House challenged me to get focused and motivated toward providing a better life for me and my family. Next, I hope to become a registered nurse and give back, in some small way, to Humewood House as thanks for all the confidence and support they've given me."
- Program Participant

Outcomes for mothers:

- Participants have proper housing and stability during their pregnancies, reducing stress and improving their ability to focus on having a successful pregnancy
- Participants develop increased basic needs life skills knowledge and are better able to meet their needs and the needs of their children
- Increased income/financial stability

Outcomes for Children:

- Children receive consistent care, are stimulated, learn from each other, and develop routines.
- Any developmental issues are identified early, referrals are made, and children experience proper support
- Children feel greater connection with their mothers and are supported in their early childhood development

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DOAP Team: Transportation and Support, without Judgement, to Shelter

ALPHAHOUSE

THE DOWNTOWN OUTREACH ADDICTION PARTNERSHIP TEAM (DOAP) PROGRAM: THE CALGARY ALPHA HOUSE SOCIETY

Fast Facts

In 2013

- 16,853 total transports
- 10,741 transports to shelters
- 3,064 transports to a hospital or a medical appointment
- CPS, Calgary Transit, EMS, and Animal and Bylaw Services called the DOAP Team through the dedicated phone line
- 2,228 referrals from Emergency Services (CPS, EMS or Bylaw)
- 1,124 transports to alcohol/drug detoxification facilities
- 903 clients found outside

The Social Return on Investment[1] for every dollar invested in the program is $ 9.43:1.

Contact Details
Adam Melnyk,
Outreach and Housing Location Coordinator
Tel: 403-470-4367
adam@alphahousecalgary.com
203 15th avenue SE
Calgary, Alberta
T2G 1G4

Program Background & Overview

The Downtown Outreach Addictions Partnership (DOAP Team) program fulfills the following roles:

- Facilitates individuals' access to local service systems of emergency shelters, health care (including detoxification and other medical requirements), addiction treatment, and housing.
- Provides education on the risks associated with alcohol and drug use, and encourage safer behaviors through the distribution of harm reduction supplies.
- Raises awareness and builds understanding in the community with respect to homelessness/ addiction through presentations in the community.

Theory of Change - Summary

If individuals facing complex needs and multiple challenges linked to their addiction, experience a trusting and non-judgmental approach that connects them to a continuum of care system with a harm reduction philosophy, then they will be more able to change their circumstances and have the opportunity to improve their quality of life, while alleviating the concern to their local community.

Participant Outcomes

The following are some of the outcomes experienced by participants:

- Participants who lacked shelter were provided with housing opportunities.
- Participants who felt marginalized are now connected to community services.
- Participants are connected to detoxification and addiction treatment facilities in order to have health concerns addressed.
- Participants who have mental health concerns are provided with access to appropriate supports.
- Participants who are discharged from the hospital have increased opportunities to follow-up with a healthcare provider.

Social Value Created

For Participants

- Decreasing vulnerability and increasing safety.
- Receiving services from shelters, community agencies, detoxification centers, addiction treatment centers, and health care services.
- Increased openness to the possibility of addressing one's circumstances after engagement with the Team.
- Avoidance of being incarcerated for unpaid tickets.

For Calgary Police, EMS, Calgary Transit, and PACT Team

- Diversion of unnecessary interventions.

For local hospitals

- Fewer days spent in hospitals due to the DOAP Team's involvement in discharge planning.
- Decreased rehospitalisation.
- Proactively identifying health concerns at an early stage, reducing the number of days at the hospital or avoiding costly procedures.

For the community

- Increases awareness surrounding individuals who face homelessness and/or addiction.
- Attendees of DOAP Team presentations are empowered to assist individuals in a difficult situation.

Participants:

- Decreased vulnerability and increased safety
- Increased ability to deal with multiple challenges and to improve community functioning
- Was transported to a place that they wanted to and that meets their needs
- Immediate health concerns related to lack of basic necessities (food, clothing) are addressed
- Increased utilization of community services/ resources to meet various needs
- Increased access to transitional housing through case management services in homeless shelters

Government:

- Cost reallocation by hospitals for minor physical health concerns, treating Hep C
- Decreased number of incarcerations due to warrants

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Diverse City: Housing & Support for Ex-offenders with Mental Health and Addictions Issues

Alberta

Social Return On Investment (SROI) Case Study:
Safe Communities Innovation Fund
DiverseCity Housing Initiative

"Having an apartment and being stable for a while, it makes me realize all the other things in life that I want to work on, and I feel like I can finally do it."

-DiverseCity Client

Fast Facts

SROI Overview:
- DiverseCity Housing provides supported mental health housing to individuals who have current criminal justice involvement and whose ability to function is significantly impacted by a mental illness/substance use disorder. Data collected between April, 2010 and November 2012

Three-year advantage SROI:
- 1.76 : 1

SROI partners:
- Safe Communities Innovation Fund (SCIF), Safe Communities, Homeward Trust

Overview of numbers (3 years):
- 64 men and women were housed; this SROI focuses on 50 of those clients
- Average investment per client: $23,191
- Average stay: 15 months

Contact Details:
Jill Kelland
www.albertahealthservices.ca

Program Background

The DiverseCity Housing Initiative is based on the Housing First model and employs a community-based multi-disciplinary Assertive Community Treatment (ACT) team to provide mental health and/or addiction treatment and housing support to individuals living in independent housing units.

Program participants are required to pay 30% of their income towards their rental costs and must have the ability to live (or learn to live) independently and be able to complete self-care. Program participants select market rental units located within Edmonton, in the neighbourhood they want to live.

Theory of Change—Summary

If adults with mental illness and/or addiction issues and criminal justice involvement have stable housing and intensive mental health support, they are more likely to be healthy, law-abiding citizens successfully integrated in their communities.

Social Value Created

The focus of the DiverseCity Housing program is to help participants to live safely and successfully in appropriate community environments by providing intensive wrap-around mental health treatment and housing supports. The duration of this program is 24 months; with flexibility to meet individual needs. The program aims to house five clients every month, with a maximum capacity of approximately 40 clients.

As a result of program support, clients will experience stable housing, improved mental and physical health, and a decrease of addiction issues and substance use. In addition, clients will have decreased criminal involvement and criminal victimization as well as decreased court appearances due to criminal activity.

Finally, clients will be able to improve their daily living skills, increase employment, and experience improved community integration and quality of life.

DiverseCity Housing Client Demographics

DiverseCity clients are between the ages of 24-55; the majority of which are male. Aboriginal clients identified as Status, Non-Status, Métis and Haida. Most clients are Canadian citizens or non-immigrants and speak English as their primary language. In addition, many of the clients are single (never married) and have either no or one child. Some have limited education (none, Junior High School) while other have secondary and post-secondary education.

The majority of clients were unemployed and not looking for paid work upon intake to DiverseCity. Prior to entering the program, clients were 'couch surfing', homeless, incarcerated, and living in sub-standard housing. Their residences included living with family and friends, living in facilities and group homes, and accessing shelters.

Client homelessness included chronic, episodic, and relative homelessness. The

Recipient of Safe Communities Innovation Fund, Alberta Justice and Solicitor General 1

Outcomes for Diverse City Clients:

- Experience of safe and stable housing
- Improved mental and physical health.
- Reduced use of drugs and alcohol, criminal activities, greater engagement in the community
- Remain safe and secure within their homes because they are confident that they will have quicker access to support services when they are needed.
- Daily living skills increase, increased independence
- Increased personal safety and decreased victimization
- Increasingly involved in positive activities (e.g., leisure, recreation, employment)
- A new sense of community

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Valuing Outcomes

What is Valuation?

- **How is valuation different than cost?**

SROI is about value rather than money. Money is simply a common unit and as such is a useful and widely accepted way of conveying value.

- A Guide to Social Return on Investment p. 8

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Step Three: Evidencing Outcomes and Giving Them a Value

Assigning financial proxies to *outcomes*

What is a 'financial proxy'?

Financial proxies are estimates of financial value where it is not possible to know an exact value. As many forms of social value are without a defined monetary value, financial proxies are necessary to estimate social return on investment.

Think !!!

- Value created from the outcomes achieved
- Value created by avoiding the alternative
- Value from the stakeholder's perspective

Types of Value Creation

- Cost reallocation
- Changes in taxes paid
- Cost savings
- Future cost avoidance
- Increased individual or household income
- Value of improved quality of life

Examples of Financial Proxy Use

SiMPACT SROI Workbook

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Stakeholders	Valuing Outcomes								
	Outcomes	Indicator		Financial Proxy	Proxy Value ($)	Proxy Source	Proxy Indicator Code	Proxy Value Per Year	Calculation Notes
Pregnant and parenting women 16-29 with possible mental health, addiction, abuse, housing, and/or financial issues	Increased housing stability/decreased homelessness	# women coming from unstable housing situations or homelessness	1	Personal cost of moving/storage (Saint John)	$55	Apple Self Storage Saint John rates: http://www.applestorage.com/en/Reservation-area1.html	NA	$330	Assuming 6 months of storage would be used, at the lowest of 5x5 (conservative estimate and reflective of circumsta participants)
			2	Cost of pain and suffering due to sexual assault (danger on the streets for women)	$90,694	SROI Canada Financial Proxy Database	J21	$90,694	Adjusted for inflation from 2008. Assuming maximum one i year.
	Decreased exposure to domestic violence	# women leaving domestic violence on intake	3	Cost of pain and suffering due to assault (personal cost of domestic violence)	$10,247	SROI Canada Financial Proxy Database	J22	$10,247	Adjusted for inflation from 2008. Used as a per-year f
	Decreased substance use	# women reducing substance use	4	Personal cost of supporting an addiction	$7,073	DeReviere, L. (2006). A Human Capital Methodology for Estimating the Lifelong Personal Costs of Young Women Leaving the Sex Trade. Feminist Economics. Vol. 12, No. 3, 383.	NA	$7,073	According to DeRiviere, young women with addictions who a the sex trade spend, on average, $12, 617 per year suppo addictions. Half of this figure has been used to represent w at First Steps might otherwise spend supporting an addictio for inflation.
	Better physical health of mother	# women pursuing healthy lifestyles (e.g. decreased smoking	5	Personal cost of smoking	$3,741	CBC News. (2013, March 28). Smokers fired up over cigarette tax increase: Say they're being unfairly singled out to shoulder deficit burden. http://www.cbc.ca/news/canada/new-brunswick/story/2013/03/28/nb-smokers-cigarette-tax-budget.html	NA	$1,871	Calculated based on lowest price of cigarettes in Moncton quite heavy smoking (a pack every two days).
			6	Value of better health - revealed preference: Cost of gym membership	$93	Fitness New Brunswick. (2013). Registration fees. http://fitnessnb.ca/	NA	$93	While individuals staying at First Steps may never buy a gym in order to improve their health, this proxy is based on *reveal* indicating the value placed on improved health by using the c the community are willing to pay to achieve this outcome.
	Increased access to necessities and personal resources freed up from buying necessities	# women accessing basic needs support that they would otherwise have to pay for themselves	7	Value of food received at First Steps (cost of healthy food basket, New Brunswick)	$464	O'Connell, J. & Hatfield, R. with Human Development Council. (2012, November). Child Poverty Report Card: New Brunswick, November 2012. http://www.campaign2000.ca/reportCards/provincial/New%20Brunswick/2012ReportcardNB.pdf Page 10	NA	$5,573	The value represented is for a "single mom with one c

Start Page | 1. SROI Scope | 2. Theory of Change - Summary | 3. Illustrating Outcomes | **4. Valuing Outcomes** | 5. Year 1 | 7. SROI Calculation Summary | Notes Year1 | 5. Year 2 | Notes Year2 | 5. Year 3

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From Outcomes to Impact

1. **Duration**: How long will each change last without further investment ?
2. **Deadweight**: What percentage of outcomes achieved would have happened anyway?
3. **Displacement:** Were there unintended outcomes? How do they impact overall value? An increase or decrease?
4. **Attribution**: What portion of the change was due to the work of another program or influence?
5. **Drop off**: Will a stakeholder's ability to maintain the outcome diminish over time?

Step Four: Establishing Impact

(1)

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Stakeholders	Valuing Outcomes											Impact								Calculation			
Stakeholder Name	Outcomes	Indicator		Financial Proxy	Proxy Value, Per Year	Quantity	Duration					Deadweight %	Displacement %	Attribution %	Drop off %					Social Return Created YEA			
															Year From Initial Funding					Year 1 (Initial Funding Year) and I			
							1	2	3	4	5				1	2	3	4	5	1	2	3	
Pregnant and parenting women 16-29 with possible mental health, addiction, abuse, housing, and/or financial issues	Increased access to necessities and personal resources freed up from buying necessities	# women accessing basic needs support that they would otherwise have to pay for themselves	7	Value of food received at First Steps (cost of healthy food basket, New Brunswick)	$5,573	22	0.7					10%	0%	0%		0%	0%	0%	0%	$77,244	$0	$0	
			8	Value of other basic needs supplies provided through First Steps	$3,540	22	0.7					10%	0%	0%		0%	0%	0%	0%	$49,064	$0	$0	
	Increased self esteem and positive interactions (positive peer influence), decreased stress, depression, anxiety. Increased quality of life.	# women with increased sense of well-being; # women with new (positive)friends	9	Quality of Adjusted Life Year (QALY)	$46,666	15	1	1	1	1	1	10%	0%	25%		25%	25%	25%	25%	$454,994	$345,340	$262,113	$19
	Decreased mental health crises and self harm	# women with decreased self harm; # decreased crises	10	Value of better mental - revealed preference: Cost of counselling session	$4,800	18	1	1	1	1	1	10%	0%	25%		25%	25%	25%	25%	$56,160	$42,625	$32,353	$2
			11	Cost of pain and suffering due to assault (personal cost to victims of violence from participants)	$10,247	2	1	1	1	1	1	10%	0%	0%		25%	25%	25%	25%	$18,445	$13,999	$10,626	$8
	Incr		12	Social Assistance (1 adult + 1 child)	$9,708	15	1	1	1	1	1	10%											
			13	Prenatal Benefit (New Brunswick)	$489	15	0.8					10%											
			14	Child tax benefit	$1,433	10	1	1	1	1	1	10%											
			15	GST Rebate	$397	21	1	1	1	1	1	10%											
			16	Personal cost savings from not using fringe financial	$749	14	1					0%											

Start Page | 1. S | ... Outcomes | 4. Valuing Outcomes | 5. Year 1 | 7. SROI Calculation Summary | No

Social Return on Investment (SROI)

first steps housing project inc.

Funded by the Government of Canada's Homelessness Partnering Strategy — Canada

I don't even want to picture where I'd be without this place. I know I wouldn't have my child. - Program participant

FAST FACTS

SROI Overview:
For every dollar invested in First Steps Housing Project Inc., approximately **$6** is created in social value. The **return to government is $1.50** for every dollar invested in the program.

Program Components:
- First Steps Residence
- Second Steps Apartment Program
- Dr. Christine Davies Education Centre
- Child Development Centre

March 2012-March 2014:
- 47 unique participants
- 4 repeat participants
- Average length of stay; 9 months
- Average age at intake; 20
- 40 previously exposed to abuse
- 24 lived on the street previously
- 14 graduated high school
- 22 increased bond with their child
- 24 children living with participants
- 16 children would have otherwise been placed in foster care
- 4 children reunited with their mothers after foster care

Contact:
Sharon Amirault, *Executive Director*
First Steps Housing Project Inc.
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info@firststepshousing.com
www.firststepshousing.com

First Steps Programming

First Steps provides a safe and healthy environment that supports pregnant and parenting young women and their children, who have no safe place to live. These women have experienced significant trauma and instability throughout their lives. Participants find themselves, and by consequence their children, caught in the cycle of poverty. First Steps helps break this cycle.

Social Return on Investment (SROI)

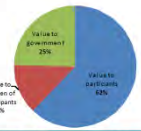
Based on program statistics from March 2012 until March 2014, First Steps created approximately $6 in social value for every dollar invested in the program.

This value was created for the participants and their children, as well as the government as they are often high service users.

For government a return of $1.50 is created for every dollar invested. The table to the right indicates some government values included in the analysis. The ratio, however, is a conservative demonstration of First Step's social value creation as some elements of social change may never be fully expressed in financial terms.

Financial Valuation for Government
Cost per homeless family per year
Cost per domestic violence victim
Cost of substance abuse
Cost of child born with Fetal Alcohol Spectrum Disorder (FASD)
Yearly additional health care costs - premature child
Neonatal hospital costs
Health costs associated with lack of vitamins (poor nutrition) during pregnancy
Hospital treatment of mental health concerns
Social assistance (1 adult + 1 child); Prenatal benefit, Child tax benefit, GST rebate (resources used by participants)
Public cost of dropping out of high school
Cost of child in foster care

First Steps Social Value Creation Breakdown by Stakeholder Group



If I hadn't had the opportunity here I would have been dead – I would have gave up on life. - Program participant

SROI analysis conducted in partnership with: SiMPACT Strategies — www.simpactstrategies.com 403-444-5683

Calculation				
Social Return Created YEAR 1				
Year 1 (Initial Funding Year) and Future Years				
1	2	3	4	5
Annual Value	$2,364,287	$867,871	$735,322	$637,318	$562,607
Present Value	$2,189,154	$744,059	$583,722	$468,447	$382,901

Total Present Value (TPV)	$4,368,284
Input	$672,946.00
Net Present Value (TPV minus Input)	$3,695,338
Funding year one SROI Ratio (TPV/Input)	6.49 : 1
Discount Rate	8.0%

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Switch to Sydney Here…

Current Challenges re: SROI in Canada …

Challenges to SROI In Canada

- Too many one-offs, not enough sector activity
- Need for consistency among diverse subjects
- Transparency of approach
- More training, more accredited practitioners
- A standard of practice
- Valuation methods

Training
Analysis

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Lets Value Common Outcomes – Commonly!!!

Project Name	Proxies used for crime								Proxies used for substance abuse							Proxies used for Housing Stability				
	J08 (Police investigation)	J03 (legal aid)	J01 (Youth court costs)	J9 (police at court)	J02 (probation)	J19 (criminal court case)	J10 (Police Call out)	J07 (youth incarceration)	H24 (addictions treatment)	PC08 (Cost of addiction per addicted person)	H4 (Emergency Room Visit)	H05 (Psychiatric Admission to Hospital)	H28 (addictions in hospital, alcohol)	H29 (Hospital treatment, psychoactive substances)	J10 (Police Call out)	HSE04 (Youth emergency shelter)	SS29 (Group Home)	SS25 (Foster care payment to parents per day)	SS27 (Child in state care)	SS09 (Social Worker)
	1		1					1	1		1	1			1	1	1	1	1	
			1				1													
	1	1	1	1	1	1		1	1	1	1					1				
	1	1	1		1				1				1							
													1	1						
	1	1	1	1	1			1												
	1		1	1				1	1											

- Start conversation across departments, sectors, organizations
- Consistency in outcomes and valuations across thematic areas
- Ideally, financial proxy innovations shared widely
- Build knowledge within organizations seeking to value outcomes….

Challenges to Valuation

- Valuation methods (like revealed preference) have been used for some time, and they all have been identified to have methodological issues e.g. people's preferences are not always well-defined or answers are highly susceptible to how questions are set
- Their use depends on your scope, particularly if resources are limited
- Use of revealed preferences can underestimate end user values
- However, the more we try to help our stakeholders value their outcomes, the clearer the 'market price' will become

Sources of Financial Proxies
www.sroi-canada.ca

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Proxy Database

SROI Canada Financial Proxy List

Add » | Search | Filters

1 - 100 of Many

Indicator Category	Indicator Code	Indicator	Date of Publication	Financial Proxy	Category of Value Created	Notes on Indicator Calculation	Source 1
						SEE FINANCIAL PROXY PC07 for totaled cost per high school drop out.	
Education	E06	Cost per high school drop-out (private/individual /personal costs)	2008	$11,589	Cost Reallocation	The full 2008 report created by Oleana Hankivsky outlines the different public and private costs of dropping out of high school in Canada by examining the health, income, social assistance, justice, and personal consequences of not completing high school. She indicates that some of these consequences are costs to the system, while others, are a cost to the individual. This figure is an aggregate of all estimated costs to the individual (health costs, lost income). The full technical report and summary reports are available at: http://www.ccl-cca.ca/ccl/Reports/OtherReports /20090203CostofDroppingOut.html SEE FINANCIAL PROXY PC07 for totaled cost per high school drop out. (Note: See per capita indicators for total direct and indirect costs of dropping out of high school)	
Education	E07	Cost per high school drop-out (intangible costs)	2008	$5,391	Cost Reallocation	The full 2008 report created by Oleana Hankivsky outlines the different public and private costs of dropping out of high school in Canada by examining the health, income, social assistance, justice, and personal consequences of not completing high school. She also indicates that there are consequences which are not financially tangible (intangible costs). She estimates a financial value for these intangible factors which include lower self-esteem, loss of control in life, decreased participation in society etc. She uses both public and private costs to estimate the intangible cost, as demonstrated on pages 66-67 of the report. The full technical report and summary reports are available at: http://www.ccl-cca.ca/ccl/Reports/OtherReports/20090203CostofDroppingOut.html SEE FINANCIAL PROXY PC07 for totaled cost per high school drop out.	
Education	E08	Substitute Teacher Pay	2007	$180.77 per day	Cost Reallocation	According to this contract, page 14: "Effective September 1, 2007, substitute teachers shall be paid one hundred and eighty dollars and seventy-seven cents ($180.77) (including 4% vacation pay) per day worked. Half days will be paid at 50% of the full day rate. Can be used as cost of teacher absenteeism	Calgary Board of Education. Agreement: Th Trustees of the Calgary Board of Education Alberta Teachers' Associatio, September 1, August 31, 2012.(2007): 14.
Education	E09	School counsellor wages	2011	$31.42 per hour	Cost Reallocation	The Alberta Wage and Salary data presents a wage range from the low, starting level wages to the high, top level wages. The wage estimation presented here is the average wage of a person with average length of employment.	Alberta Wage and Salary Survey 2011
Education	E10	Elementary School Teacher Wages	2011	$36.12 per hour	Cost Reallocation	The Alberta Wage and Salary data presents a wage range from the low, starting level wages to the high, top level wages. The wage estimation presented here is the average wage of a person with average length of employment. Some agencies have used this proxy to estimate reduced additional teacher time per period of missed school (Elementary School)	Alberta Wage and Salary Survey 2011
Education	E11	Secondary School Teacher Wages	2011	$37.46 per hour	Cost Reallocation	The Alberta Wage and Salary data presents a wage range from the low, starting level wages to the high, top level wages. The wage estimation presented here is the average wage of a person with average length of employment. Some agencies have used this proxy to estimate reduced additional teacher time per period of missed school (Secondary School)	Alberta Wage and Salary Survey 2011

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Exciting news – Canadian Version to Be Launched in 2016 - Stay Tuned!

HACT
Ideas and innovation in housing

Lizzie Trotter
Jim Vine
Matt Leach
Daniel Fujiwara

Code	Outcome	Unknown	<25	25-49	>50
EMP1401	♦ Full-time employment	£10,767	£9,780	£11,688	£10,199
EMP1402	♦ Self-employment	£11,588	£13,157	£11,952	£10,538
EMP1403	♦ Part-time employment	£1,229	£737	£1,824	£1,966
EMP1404	♦ Government training scheme	£9,447	£11,903	£5,668	£12,817
EMP1405	♦ Secure job	£12,034	£10,871	£12,148	£11,969
EMP1413	♦ Apprenticeship	£2,353	£1,861	£2,948	£3,090
EMP1407	♦ Vocational training	£1,124	£1,124	£1,124	£1,124
EMP1408	♦ Regular volunteering	£2,357	£2,003	£1,850	£2,432
EMP1409	♦ Regular attendance at voluntary or local organisation	£1,773	£1,901	£1,064	£1,064
EMP1410	♦ General training for job	£1,567	£2,507	£1,437	£2,507
EMP1411	♦ Employment training	£807	£484	£887	£940
EMP1412	♦ Employed parent for children (11-15)	£1,700	£1,700	#N/A	#N/A
ENV1401	» No problem with teenagers hanging around	£5,760	£6,963	£4,684	£8,746
ENV1402	» No problem with vandalism/graffiti	£4,072	£2,443	£4,684	£4,906
ENV1403	» Not worried about crime	£11,873	£16,955	£12,034	£13,577
ENV1404	» No problem with anti-social behaviour	£6,403	£3,842	£7,199	£6,496
ENV1405	» Police do good job	£5,340	£6,263	£6,082	£3,204
ENV1406	» No litter problems	£3,555	£3,173	£3,684	£3,300
ENV1407	» Able to obtain advice locally	£2,457	£2,507	£1,567	£3,561
ENV1408	» Good neighbourhood	£1,747	£1,048	£1,048	£2,795
ENV1409	» Feel belonging to neighbourhood	£3,753	£2,706	£2,252	£6,004
ENV1410	» Talks to neighbours regularly	£3,848	£2,706	£2,532	£6,157
HEA1401	High confidence (adult)	£13,080	£14,224	£13,065	£12,565

Coversheet | Value Calculator | Results | Social Value Bank | Description and Evidence | Relationships

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Thank you!

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SiMPACT Strategy Group is a founding Network Partner of:

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