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Social Return On Investment (SROI) Case Studies

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SROI Pilots — Program Overview

Fast Facts

SROI Pilots: Sponsored by the City of Calgary's Family, Children and Social Services (FCSS), the SROI pilot program was designed and delivered by The SiMPACT Strategy Group.

The purpose of both SROI pilots was to build knowledge of SROI as a planning and evaluation tool that will assist social service agencies to demonstrate the value of their work.

Thirty-eight participants have been involved to date. 14 of the 34 participating agencies have completed a SROI case study to date. Several other participants are planning finish their case studies in the near future.

Participating Organizations :

- Ability Society of Alberta
- Aspen Family Services
- Big Brothers and Big Sisters
- Boys and Girls Clubs
- Calgary Counseling Centre
- Calgary Family Services
- Calgary Inter-faith Foodbank Society
- Calgary John Howard Society
- Calgary Learns
- Calgary Seniors' Resources Centre
- Calgary Sexual Health Centre
- Calgary Women's Emergency Shelter
- Calgary Youth Justice Society
- Canadian Sport Centre Calgary
- Catholic Family Service
- Children's Cottage
- Closer to Home Community Services
- Discovery House Family Violence Prevention
- Distress Centre Calgary
- Families Matter Society
- Hull Child and Family Services
- Inside Education Society of Alberta
- McMann Youth, Family and Community Services Association.
- Momentum
- Peer Support Services for Abused Women (PSSAW)
- Salvation Army, Divisional Headquarters
- Woods' Homes
- YWCA of Calgary

March 2009

Emphasis on social service agency reporting on outcomes and impact is only expected to increase. Public, private and corporate funders seek to invest in agencies that can both communicate and demonstrate how their programs and service offerings positively impact their target clientele. For this reason, FCSS Calgary continues to scan the horizon for opportunities to build capacity among our funded agencies so that they can effectively respond to the reporting and evaluation challenge.

FCSS Calgary seized the opportunity to pilot the use of the social return on investment methodology (SROI) because we understand the value of the work conducted by Calgary's social service agencies as they collectively, routinely interact with thousands of Calgarians each year. We also witness many agencies struggle to express the value of their programs to audiences that are not familiar with their activities, and to audiences that require detail of the value of agency work in order to invest into their activities. Our involvement in these two SROI Pilots is part of an ongoing strategy to support agency skill-development in order to effectively respond to increasing and varied demands to report on programming results and impact.

The two SROI pilots held to date have brought together 44 senior managers of 38 social service agencies seeking to become more effective at demonstrating their value proposition. Participants came together for a program of group-based learning and each agency accessed individual coaching in between group seminars. For those who wrote a case study, the additional time commitment averaged an additional 5-6 hours in order to bring their case studies to completion.

FCSS Calgary does *not* anticipate that conducting an SROI analysis will become a mandatory element for reporting back to us on annual agency activities. However, we will continue to encourage our agencies to consider including an SROI analysis into their evaluation and reporting processes because of the insight SROI offers into an agency's ability to create value far beyond the investment made into their annual activities.

As the participants in the SROI pilots now know, the real benefit of SROI analysis is the methodology's strength as a planning and strategy framework. Project planning, evaluation of results and communication of achievements—these three elements are the foundation for excellence in continuous quality improvement and reporting. Ultimately, we share the same goal—to achieve improvements in the circumstances of individuals, families and communities across Calgary.

Finally, FCSS would like to thank the SiMPACT Strategy Group for their ongoing efforts to build local capacity in SROI. Stephanie Robertson and her team at SiMPACT believe passionately in the value of the SROI methodology as a tool to plan for, evaluate and express social value creation. The case studies produced thus far are evidence of their commitment to assisting local agencies to understand the potential for SROI as an effective management and measurement framework for the non-profit, human services sector.

We look forward to receiving your feedback on the enclosed portfolio of SROI case studies.



Heather White MSW, RSW

Social Planner

Family and Community Support Services (FCSS) Community Neighbourhood Services The City of Calgary



Social Return On Investment (SROI) Case Study: Youth Matters Program



Fast Facts

Aspen Family and Community Services Network Society (Aspen) supports the development of people's core strengths to help them deal with challenges and create a better life for themselves and their families.

2008 Program:

- 18 programs offered to Calgary children, families and communities.
- 5399 clients served, of which 3279 were children or youth under the age of 21 years.
- 64 volunteers provided 4693 hours of time in 784 volunteer opportunities.
- 95% of clients reported incomes less than the low-income cut-off (LICO).
- 87% of clients surveyed felt engaged by Aspen services.

SROI Overview: Youth Matters provides support for "at risk" youth (13-21 yrs.) who have a history of addictions, criminal behaviour or poor decisions and made a commitment to making positive and healthy lifestyle choices.

SROI Average: 1 : 11:40

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"You helped me and didn't ignore me. You helped me when my mom wasn't there!" - A participant in the Youth Matters Program

Program Background

Calgary youth are faced with very difficult choices and decisions quite early in life. These include decisions about drug use, positive and negative peer involvement and learning to accept oneself as a unique and individual person.

Such choices can be made easier when youth have access to someone who will listen, be a positive role model and offer links to supportive networks.

The Youth Matters Program supports at-risk youth living in North Central and North East communities within Calgary. Youth Matters offers crisis support, positive group activities, opportunities to develop leadership skills and education about healthy living.

Youth Matters staff connect with schools and youth-friendly organizations in order to engage youth who are experiencing difficulties. Staff provide one-on-one individual support as well as group programs.

The needs expressed by the youth involved range from requests for support in dealing with addiction to support to avoid repeated criminal behaviour. Other youth require information on how to access secure housing or an adequate supply of food. Many of the young people involved in Youth Matters are struggling with low self-esteem, the impact of being bullied and having a poor body image. Many have histories of addictions, criminal behaviour and have experienced unhealthy relationships.

Social Value Created

Youth involved in the Youth Matters program are often isolated and in need of social and life skills. Many have a history of drug use and of criminal behaviour. Without positive role models and support, these youth are at very high risk of

returning to negative behaviours they would otherwise choose to avoid.

Many young people struggle to feel comfortable within their peer group. They may participate in high-risk situations in order to fit

in and to have a sense of belonging. Some become bored and get involved in risky behaviours in order to create a feeling of excitement and challenge in their lives.

Youth Matters participants acquire new skills and abilities that assist them to make smart and informed decisions about relationships, employment opportunities, school and housing. These youth become connected to each other, connected to supportive adult relationships and to alternative, positive activities and resources. This results in stronger connections to a positive social network as well as a sense of belonging and ownership.

Youth Matters Program Clientele

Throughout 2008, 28 youth were supported by a one-on-one relationship with a member of the Youth Matters team. An additional 126 youth were involved in group programming.

Participants fall within one of three profiles. The first profile typically includes five to six youth

Theory of Change
If at-risk youth are engaged through activities and diverse opportunities they learn to connect with each other, adults and their community which increases their ability to manage risk and create and maintain positive changes in their lives.



SROI Case Study: Youth Matters Program

annually, who have been identified as gifted. These youth struggle with interpersonal relationship issues, depression, loneliness, school issues (underachieving/boredom) and low self esteem. Youth Matters' staff engage these youth by providing a listening ear and activities to challenge their minds and eliminate feelings of loneliness and boredom.

The second profile of youth engaging with Youth Matters is one who is struggling with or recovering from addictions and/or criminal behaviour. Youth in profile two have a history of police involvement and often need crisis support

in order to have secure and stable housing, adequate food, transportation in order to access school, etc. Youth in profile two represent more than 50% of the youth seeking one-on-one support with Youth Matters staff, annually.

The third profile represents the largest group served (126 youth in 12 groups). Typically meeting in groups arranged at their school, profile three youth have been identified by teachers or school counsellors as needing extra support to work through peer relationships, build self-esteem, figure out family issues, etc.

Case Study— Social Value Created: Youth Profile One (Gifted Youth) / Trudy

The following is a snapshot of a typical profile one youth along with an overview of how involvement in Youth Matters creates social value.

Trudy is a young female diagnosed with Attention Deficit Hyper-activity Disorder (ADHD). Her grandmother is a remarkable woman who fought the legal system to gain custody of this gifted youth as Trudy's parents had many problems with drug and alcohol addiction.

Prior to living with her grandmother, Trudy had been in and out of foster homes, which left her with little self-esteem and serious anger management issues. Trudy's social interactions often ended with her lashing out and swearing at her peers. She treated her teachers the same way, resulting in so many suspensions that she was close to being expelled from school.

Trudy's grandmother contacted Aspen Youth Matters Program for assistance as she became increasingly uncomfortable with Trudy's behaviour as well as less

confident that she could parent Trudy effectively. If the situation had not improved, chances were high that Trudy would once again be living within the foster care system.

Trudy accessed one-on-one support by the Youth Matters support worker. She initially met with the support worker once a week, where she began to share and process the issues she was dealing with. He invited her to a Youth Leadership Group at the local junior high school where Trudy met other students and started coming out of her shell. Youth Matters supported Trudy in participating in a variety of leadership exercises and her involvement in extra-curricular activities started to increase including a regular swim program, figure-skating and involvement in a theatre production.

Through partnerships with other organizations, Aspen connected Trudy to new and rewarding experiences. She now has healthy self-esteem, many positive peer and teacher interactions and is no longer at-risk of being expelled from school. Her grandmother is now comfortable with her behaviour. There is little risk that

Trudy will return to foster care in the future.

Gifted youth like Trudy typically represent 25% of Youth Matters one-on-one clients. Youth Matters assists these gifted youth to discover their passions and to take an active role shaping their own futures.

As a result, Youth Matters prevents gifted but troubled youth from entering the mental health system because their depression and loneliness has been addressed. Through their involvement,

these gifted youth learn to develop their personal support systems, thereby increasing their ability to handle adversity into the future.

Table 1:

Gifted Youth: Social Value Calculation (2008 - 5 Youth)				
SROI Indicators Included:	\$\$ value per change	% of co-hort experiencing this change.	\$\$ value for entire co-hort	Notes
1 Avoidance of Police Time	\$2,052	40%	\$4,104	\$342 per hour, assumed 2hrs*2 youth * 3 incidences avoided
2 Avoidance of Court Appearance	\$1,275	40%	\$2,550	assumed 1/yr, two incidence avoided
3 Avoidance of Police in Court	\$319	40%	\$638	assumed appearances in court avoided
4 Avoidance treating undiagnosed mental illness due to stress of isolation	\$1,447	20%	\$1,447	walk-in clinics, counselling avoided, etc.
5 Avoidance of one (short) search for a runaway youth	\$1,912	20%	\$1,912	minimum cost of a police investigation
6 Part-time earned income	\$5,760	80%	\$23,040	assumed 15 hrs/week @ \$8 * 4 youth
7 Foster care avoided	\$24,090	20%	\$24,090	avoided possibility long-term care @ \$66/day (annually), one youth
Social value created annually (5 youth)			\$57,781	
Total annual investment (5 Youth)			\$35,000	
SROI ratio:			1.65	



SROI Case Study: Youth Matters Program

Social Value Created: Youth Profile Two (Avoiding Criminal Behaviour/Addictions) / Joe

The following is a snapshot of a typical profile two youth along with an overview of how involvement in Youth Matters creates social value.

Joe was a troubled adolescent of 12 years of age. He was known to police due to repeated criminal behaviour and had spent time in jail on two separate occasions. Joe was on house arrest awaiting time in court as a result of being required to face additional charges.

Joe was hanging out with an older crowd of disenfranchised youth to whom he was desperately trying to prove himself. He was not attending school, which often went unnoticed due to lack of supervision at home. Essentially, Joe was on a life path that was not likely to turn out well.

The Youth Matters program provided Joe with someone to talk to. Joe used his relationship with his Youth Matters support worker as an excuse to break ties with the older crowd who were a source of negative influence in his life. His support

worker became an important positive female role model, in the absence of a mother or aunt able to provide a positive example.

Joe's probation officer and Youth Matters support worker worked with Joe to develop a plan to turn his life around. He enrolled in a Youth Matter's summer program that enabled him to complete 44 hours of community service. During this time he stayed out of the court system and did not break any laws, which improved his profile as a youth on probation.

Over the summer, Joe met peers his own age and developed some strong new friendships. In the course of completing his hours of community service, Joe developed valuable new leadership skills. He demonstrated his commitment to charting a new course for himself by staying in close contact with his Youth Matters support worker.

The Youth Matters program recognizes that youth struggling to overcome addictions and/or to leave a criminal lifestyle need support in finding new friends and support systems.

Table 2 (Youth in Crisis- 15 Youth in 2008)

Crisis Youth: Social Value Calculation (2008 - 15 Youth)					
SROI Indicators Included:	\$\$ value per change	% of co-hort experiencing this change.	\$\$ value re: co-hort	Notes	
1	Avoidance of youth incarceration	\$3,500	40%	\$21,000	\$250 per day, minimum 2 weeks, 6 youth
2	Avoidance of youth court process	\$1,275	40%	\$7,650	\$1,275 per process, 6 youth avoided
3	Avoidance of police presence in court	\$319	40%	\$1,914	\$319 per need for police presence in court
4	Part-time employment	\$5,760	80%	\$69,120	80% of 15 youth were able to get a part-time job.
5	Elimination of suicidal tendencies	\$8,878	13%	\$17,312	assuming 2 youth avoided one further hospital admission each
6	Mental health improved and managed	\$2,894	0%	\$0	2 youth improved mental health
7	Avoided need for 'lock-up' intervention as a result of involvement in prostitution	\$14,280	0%	\$0	2 youth diverted from prostitution and 'lock-up' for one month - minimum cost is \$238/day.
Social value created annually (15 youth)			\$116,996	<p>This is not an easy task. For that reason, Youth Matters support workers are there to assist in a wide variety of ways, whether that be crisis support, basic needs support, recreational support or companionship and just listening.</p> <p>In the course of their involvement in Youth Matters, young people discover their own strengths. They build personal resiliency, which increases their ability to cope and contributes to the development of a significantly more positive view of themselves and their own future.</p>	
Total annual investment (15 youth)			\$35,000		
SROI ratio:			3.34		

Social Value Created: Profile Three (Developing

The following are two snapshots of typical profile three youth along with a summary of how involvement in Youth Matters creates social value by working with youth of this profile.

Sarah is a 15 year old referred to the Grow Girls group by her mother. She had experienced significant parent/child conflict and abuse at home and was having difficulties at school as a result. Sarah had spent a couple of weeks in a care facility due to her home issues. She was being bullied and had been admitted to the hospital three times due to suicidal thoughts. Sarah was beginning to use illegal drugs as a coping strategy.

Involvement in the Youth Matters Grow Girls group assisted

Sarah to become more positive in her interactions with others and in caring for herself. Sarah now lives with her mother and they are attending counselling to work on their relationship.

Sarah gained the courage to apply for a job. She has acted responsibly and has maintained her employment. She now has new, positive friendships, volunteers regularly and remains completely clean of drugs. Her self esteem has increased dramatically.

Sarah says, "Grow Girls is a meaningful activity in my life. Youth Matters gives me someone to talk to and helps me achieve my goals".



SROI Case Study: Youth Matters Program

Social Value Created: Profile Three (Developing Positive Peers Relationships & Self-Esteem) / Henry

Henry was 14 years old. Having lived in and out of foster homes for 5 years, Henry has difficulty with authority figures. This was affecting his time at school and had led to numerous suspensions from school. Henry began to participate in the Youth Matter's LEAD group being offered at his high school at the request of his guardian.

that offered the potential to meet new friends. Through LEAD, Henry had many new experiences that opened his eyes to a wide variety of issues that affected his community. When Henry expressed interest, LEAD connected him to activities that enabled him to get involved.

Table 3:

Profile Three: Grow Girls - Social Value Calculation (100 Girls)				
SROI Indicators Included:	\$\$ value per change	% of co-hort experiencing this change.	\$\$ value re: co-hort	Notes
1 Child welfare avoided	\$86,870	20%	\$1,737,400	minimum of \$238/night in group placement annually (one youth)
2 Hospital stays avoided	\$8,878	6%	\$53,268	one mental health related admission to hospital (one youth)
3 Working part time	\$5,760	30%	\$172,800	working part time (one youth)
4 Avoidance of police intervention	\$342	15%	\$5,130	\$342 per hour, assumed 2hrs*2 youth * 3 incidences avoided
5 Avoidance of one (short) search for a runaway youth	\$1,912	10%	\$19,120	minimum cost of a police investigation
Social value created annually for co-hort:			\$1,987,718	
Total annual investment in co-hort:			\$70,000	
SROI ratio:			28.40	

Henry started coming to the sessions and immediately became interested in the LEAD program. He explored opportunities

One of Henry's teachers observed Henry during a LEAD activity and remarked, "I would never have thought that Henry would have ever chosen to participate in a program like this." To the teacher it was a welcome change. To Henry it was a new, positive chapter in his personal development that offered the potential for positive steps toward the future.

Grow Girls and LEAD are two of the many groups offered through the Youth Matters program. Both group-based programs support adolescents who are dealing with low self-esteem, poor body image and other social pressures, by offering them opportunities to develop their own leadership capacity, employability skills and interests in volunteerism.

The foundation of the Grow Girls and LEAD programs is to engage youth in goal-setting in relation to their own personal achievements. They then develop new, positive relationships through a wide range of social social/recreational activities. One success offers significant social value, **SROI of 1 : 28:40.**

Conclusion

Youth Matters is a program focused on assisting Calgary youth to adapt and overcome challenging circumstances.

These challenges may be the result of the perception of being different or misunderstood, which contributes to debilitating feelings of isolation and loneliness. They might be caused by a desire to overcome an addiction to drugs or alcohol, yet without support few youth will be successful in overcoming addictions.

Many youth find themselves involved in criminal behaviour. They want to change the course of their lives, however, similar to those with addictions, these youth require support and clear alternatives to negative peer pressure. Ongoing peer pressure and group expectations are frequently a key contributor to criminal involvement at a young age.

A surprising number of youth are troubled by low self-esteem, poor body image, lack of confidence and confidence in their own future. These youth require positive alternatives for socialization and group activities, in order for them to progress through the critical adolescent and teen years with a positive attitude, and skills and experiences that will enable healthy lifestyle choices.

Youth Matters addresses the needs of youth expressed above through one-on-one support, group programs and positive options.

A range of programs are available, in order to meet the varied needs of the youth involved. Across the range of program investment and social value that results, the annual SROI of Youth Matters is **1 : 11:13.**

Table 4:

SROI Average: Youth Matters	
Annual SROI Ratios	
Gifted Youth	1.65
Crisis Youth	3.34
Grow Girls	28.40
SROI ratio average:	11.13



Social Return On Investment (SROI) Case Study: Beltline Youth Centre



Boys & Girls Clubs of Calgary

Fast Facts—About Boys and Girls Clubs of Calgary

The Boys and Girls Clubs of Calgary is here to support and respond to and to offer every child who needs us, *A good place to be.*

- Operates 25 locations in Calgary
- Connects with 40,000 children, youth and their families each year.
- Offers educational support, employment preparation, life and living skills and arts and recreation programs.

Beltline Youth Centre

- links 290 youth, who would otherwise be marginalized and considered high-risk, to positive social, education and recreational activities;
- provides services to increase their employability;
- reduces educational barriers;
- exposes youth to positive lifestyle choices;
- builds relationship with staff through the provision of needed services;
- creates hope;
- contributes to a sense of belonging by providing a safe and healthy environment where relationships can be fostered.

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“Youth, 15-24, have the highest unemployment rate of any group in Canada, and, for those employed, they make up over half the workers earning low wages.” National Poverty Organization, 2004

Program Background:

The Beltline Youth Centre (BYC) serves as a link to the community for immigrant youth and their families. Beltline is a free-of-charge centre accessible to all youth in Calgary.

Many youth involved in Beltline are routinely exposed to local gang activity or have witnessed violence in their neighbourhoods. They typically are living in or close to poverty. Many attempt to work multiple shift jobs at minimum wage in order to make ends meet.

Beltline is often the only place where these youth feel safe, respected and accepted.

The referrals and information shared by staff regularly filters back to the youths’ families, as often times the youth are better able to speak English than their parents. As a result, Beltline ends up indirectly supporting large number of immigrant families to work their way through the maze that is their new home, Canada. Beltline youth have few other options to access free recreation and greatly benefit from the tutoring, support and professional advice that is offered by Beltline Staff.

Social Value Created

Beltline helps to prevent youth, who are mostly immigrant and have only lived in Canada for a short time, from getting involved or further involved in street and/or gang activity. They come from low income families, who are

experiencing a number of barriers, including limited skill in English. This prevents many families from accessing resources that would otherwise help them to settle into their new lives in Canada.

Beltline youth often struggle with school and/or finding work; some are involved in gang or street life and struggle with making positive life decisions. Not only are they dealing with “normal” issues that teens face (i.e. peer pressure, drugs/ alcohol, relationship issues, deciding what to do with their lives) but

those issues are compounded by poverty, their community of residence, and cultural issues.

Theory of Change
 If at-risk youth that feel isolated due to their cultural experience have social, educational, recreational and employability opportunities, then they will have the tools to make positive life choices and transition into adulthood successfully.

Beltline Youth Centre Clientele

Beltline primarily serves immigrant youth. Participants originate from around the world and yet are primarily:

- between 12 and 24 years old;
- socially & economically disadvantaged;
- immigrant, visible minority youth from war torn countries;
- living in poverty.

290 Calgary youth are involved in Beltline and engage with the youth centre annually:

- 50 youth aged 12-15
- 130 youth aged 16-18
- 60 youth aged 19-21
- 50 youth aged 22-24

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



SROI Case Study: Beltline Youth Centre

Boys & Girls Clubs of Calgary

Beltline engages youth in a number of social and recreational activities that are designed to indirectly impact their ability to become productive citizens. For example, basketball is the

“vehicle” that staff use to get the youth through the door. While playing ball, staff have the chance to build relationships with the youth, which creates opportunities to help them in other areas of their lives (i.e. homework, job search, resume writing, assistance with “red tape” related to immigration, solution

Social Value Creation

The Beltline Youth Centre creates social value by engaging youth who would otherwise be socially and economically marginalized as a result of being new to Calgary and/or new to Canada. Many are not fluent in English, which becomes an obstacle preventing them from succeeding at school, interacting with peers in a positive manner, securing part-time or full-time work or becoming settled.

Many have experienced unimaginable difficulties in their journey to Calgary, including poverty, civil or territorial war, physical or environmental disasters, loss of friends and family, even persecution.

These experiences, then the experience of moving to a foreign place and feeling unable to express oneself, can lead youth to feel extremely isolated, which leads to an increasing sense of frustration and helplessness.

These emotions can be difficult to overcome without strong

links to a reliable community that will help to counter those feelings by offering a sense of security and an opportunity to belong. Beltline offers 290 youth a place to meet other youth who can relate to their experiences and now find themselves facing similar challenges while living in Calgary.

Without Beltline, many participants would be increasingly isolated. Varying degrees of isolation can lead youth to involvement with a negative peer group, either by choice or as a result of ending up in uncomfortable circumstances.

Reallocating Scarce Resources

Based on five years of programming, Beltline staff estimate that scarce city and judicial resources were reallocated in the following ways, as a result of their work with the 2007 cohort:

- 50 of the 300 youth would otherwise be demonstrating negative behaviour, monthly, that would require police intervention;
- 15 youth would otherwise end up in front of a youth court judge, each year, which would also require police attendance;
- Eight youth would otherwise be placed in a youth detention centre, and then require probation.

Table 1. Annual SROI Beltline Youth Centre

Beltline Youth Centre: Social Value Calculation		
SROI Indicators Included:	Total Value YR 1	Notes
1 Avoidance of Police Time	\$205,200	\$342 /call-out, 50 youth (of 300) would be face-to-face with police, once a month
2 Avoidance of Youth Court Process	\$19,125	\$1275/process, 15 youth (of 50 of 300) would end up in front of youth court judge
3 Avoidance of Police in Youth Court	\$4,785	\$319/appearance, 15 youth court appearances are avoided by police
4 Avoidance of time in prison	\$8,400	\$150/day youth detention, 8 (of 50 of 300) would be in youth detention for 7 days each
5 Avoidance of probation time	\$10,758	\$30/hour, 2 hours week/26 weeks * 8 youth
6 Part-time earned income	\$184,320	\$8/hour * 8hrs/week*48 weeks/year * 60, who then move into full time work in year 4
7 Permanent employment	\$672,000	\$10/hour * 40 hrs/week*48 weeks/yr * 30
Social Value Created (per 290 participants)	\$1,104,588	begins work at minimum wage, the social value created by increasing personal and/or household income is more than \$850,000 each year.
Total program investment	\$216,539	While the personal presentation and interview skills developed are important, Beltline staff will say that the most important thing that youth develop at the Beltline Youth Centre is a belief in their own ability and future potential.
Investment per person	\$747	
One year SROI ratio	\$5.10	

Skill Development and Job Readiness

Beltline staff also work to increase the employability and job readiness of participants. Some succeed in securing part-time work while others pursue and secure full-time work.

If each of the 90 youth referred to in Table 1



SROI Case Study: Beltline Youth Centre

Boys & Girls Clubs of Calgary

Success Stories

Success on the Basketball Court

Tim was a refugee from Sudan who began coming to Beltline as a tall, awkward, 13 year old who liked playing basketball with friends. It became his daily routine to come to Beltline and play for a couple of hours and Tim's skills quickly improved. He began to stand out as he played for his junior high school team.

Tim practiced over the summer and made the high school team. His team went to the Calgary city championships and Tim quickly built a reputation as one of the best players in the city. After two years playing high school basketball, he was recruited to play for the Boys to Men Academy in Chicago for his final year. Tim became ranked as the 93rd best senior in the United States after only one season. Upon graduation, he was offered a full scholarship to DePaul University.

Tim's experience has made a huge impact on the youth at Beltline. Every weekend the weight room and basketball gym are full of passionate youth who believe that they too can work hard, improve their skills and find success like Tim.

A Sense of Belonging

Imagine being ten years old and watching your mother get injured during a bombing raid. Imagine running into a burning building to find your 6-year-old sister. Imagine realizing that your village has emptied out and that your mother is nowhere to be found. Imagine walking for two days, with your sister, until you are placed in a refugee camp – for two years. Finally a host family in Calgary sponsors you to come to Canada.

John came to Calgary from an African country in turmoil. He struggled to belong, had difficulty in school, hung out with a negative peer group and was starting to make bad choices. At 14, John heard about the Beltline Youth Centre and started attending. He accessed the computers and volunteer tutors. John's grades improved and he became more successful at school.

Today, John is now 18, sees a brighter future for himself and remains involved at Beltline. He will tell you that Beltline staff, support and friendships gave him a much yearned-for sense of belonging and have made a significant impact on his life.

Conclusion

Time and time again, research illustrates that a socially marginalized or isolated person will eventually seek out community. If a positive community is not available, they are at-risk to create a negative community, which may include gang involvement, drugs and criminal activity.

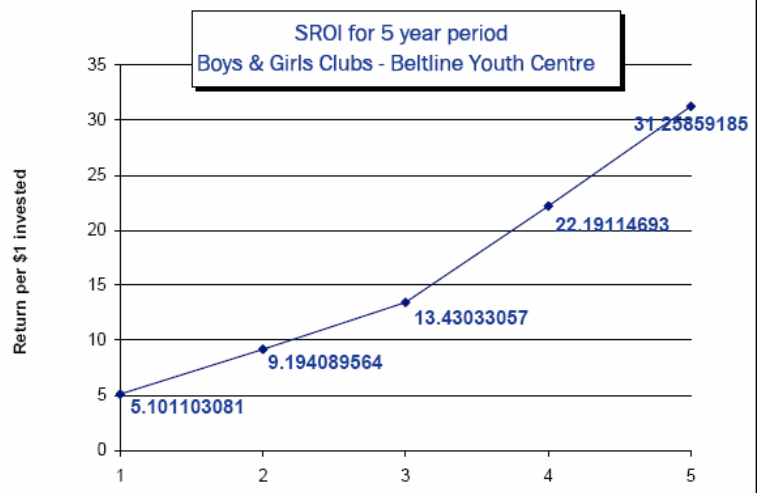
When these things occur, a young person is less likely to graduate high school, has reduced wage-earning potential and a higher likelihood of continued involvement in crime, in drugs and in other anti-social behaviour.

Participants in Beltline Youth Centre programs are at serious risk of all of the above. Interestingly, many get involved in Beltline for the long term, illustrating the value they place on the positive and supportive community that Beltline offers.

At least 35% of the 300 youth involved in 2008 had been a Beltline regular for the three previous years. They remain involved because of the support and friendship offered within the Beltline community, which contributes to each individual developing a more positive personal view of their own future prospects.

Access to tutoring, employability and job-readiness training are additional significant factors in the development of a more positive outlook on each youth's future prospects.

Graph 1. 5-year SROI Beltline Youth Centre (one cohort, 290 youth)





Social Return On Investment (SROI) Case Study: Calgary's Senior Resource Society Investing to strengthen society

Fast Facts

The Calgary Seniors' Resource Society (CSRS) is a registered non-profit charity that provides essential services and supports to seniors. Efforts are focused on low-income, isolated and vulnerable seniors in our communities.

Subject of SROI: CSRS Outreach Services are provided by outreach workers are a team of provincially registered social workers who work to identify, connect with and support low-income, isolated and vulnerable seniors in our communities.

Local Funders: The Calgary Foundation, FCSS, First Calgary Savings, TransCanada, United Way Calgary

By the Numbers (2007):

- 5,451 individuals served through CSRS outreach services
- 4309 responses to requests for information
- 474 referrals from hospitals & doctors regarding seniors with needs who are otherwise alone
- 668 individual cases managed, 65% over the long term
- 1,099 requests of assistance made directly by clients
- 1,353 inter-agency referrals made
- 7,605 hours of client service hours provided

Contact Details:

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Community Relations Manager
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www.calgaryseniors.org

“They say there are angels among us ~ and I add you to my growing list of those who have assisted me in my time of need.”

- Mary (73 years old), Outreach Client

Background

The Calgary Seniors' Resource Society (CSRS) is a registered non-profit charity that works to enhance the independence, quality of life and human dignity of seniors in Calgary. CSRS provides home services and community-based programs to connect seniors to people and resources that contribute to their ongoing independence and quality of life.

The outreach program is a central part of CSRS' work. The CSRS outreach team is made up of provincially-registered social workers skilled at identifying, connecting with and supporting low-income, isolated and vulnerable seniors in Calgary. Through CSRS outreach, seniors access the information, encouragement and support they require to make positive choices, take action and enhance their quality of life. The result enables seniors to maintain their personal dignity and supports their ongoing independence.

Social Value Created

CSRS' outreach workers provides support to seniors in Calgary in a variety of

important ways. Outreach activities range from ensuring that seniors are informed on their eligibility, so that they do receive the

pension, range of benefits and access to publicly-funded home-based services as necessary. CSRS outreach support also extends to emotional and complicated issues such as resolving situations of relating to elder abuse and dealing with elder suicide.

Low-income, isolated and vulnerable seniors who are

engaged by the CSRS outreach team are much more likely to be able to manage their personal circumstances, therefore to avoid the likelihood of being involved in crisis situations that do result when seniors are isolated, impoverished and living in poor health.

The support offered by CSRS outreach workers means the seniors engaged in the outreach program are significantly less likely to require a crisis intervention. They are also more likely to avoid needing emergency medical care and other services offered in response to a crisis.

CSRS Outreach services aim to keep seniors in their homes as long as possible.

Theory of Change
If low-income, isolated and vulnerable seniors are connected to needed resources and available support services that support them to make positive choices, they are much more likely to live healthy, dignified and independent lives while remaining in their own communities.

Funding provided by:



Learning with:



Convened by:





SROI Case Study: Calgary's Senior Resource Society

For those no longer able to live independently, CSRS outreach assists them to experience transition in a comfortable and appropriate manner. In 2007, the CSRS outreach team worked toward this important goal with **668** long term clients.

Outreach Services Client Profile

70% of CSRS outreach clients are at least 70 years of age. 70% are female. Many receive Assured Income for the Severely Handicapped (AISH) income support. CSRS clients are typically living on very low-incomes, are vulnerable, and are isolated from other support networks.

Generally speaking, CSRS clients fall into two broad profiles. The first is a senior who is home-based, isolated and limited in mobility. He or she lives on a low income, tends to be malnourished and unhealthy. They are often suicidal. 65% of CSRS clients fall into this category. They often become clients after being referred by a hospital because they have no local support at the time of discharge after a period of illness.

One real example would be an 81 year-old widow with no children. She suffers from macular degeneration and is

legally blind. She is severely arthritic and lives below the low income cut off of \$16,350/year. Her neighbourhood does not offer a grocery store within walking distance, nor adequate public transportation. She is malnourished. This contributes to her depression and increasingly poor health.

The potential consequences of not engaging with this senior are quite severe. If left isolated, she may die in isolation and remain undiscovered in her home for quite some time.

The second profile of a CSRS outreach client is of a senior who is still functional and living independently, yet is living on the edge of the low income cut off (LICO). This renders them extremely vulnerable to any unexpected bills or expenses, or any sudden changes in their personal circumstances.

Changes such as a death of a spouse, an unanticipated medical condition, a sudden financial demand can suddenly change the affordability of their own home. In this case, they must choose to sacrifice basic necessities such as nutritious food, even regular meals. These unexpected changes increase their vulnerability and are destabilizing.

Calculating the SROI of Calgary Senior Resources Services' Outreach Program

Social value is created by CSRS Outreach Workers each time a senior's situation is stabilized and they avoid experiencing crisis.

In 2007, at least 668 CSRS clients would otherwise have had at least one emergency incident involving the police, had it not been for the engagement of a CSRS outreach worker. For 75% of the total group of 668 clients, an emergency response, transportation and admittance to a hospital emergency unit, examination by a doctor and a three-day hospital stay would have been the likely result.

Another possible outcome for many CSRS clients would be a psychiatric admission to hospital. When this occurs, the average stay is 65 days. Often, the senior will not have friends and family to support their transition back to living independently in their own homes.

Social value is also created via CSRS' ability to mobilize volunteer resources. In 2007, CSRS volunteers drove 1.5

million kilometers as they provided 1,954, free, round-trip transportation to low-income seniors. This transport would have enabled CSRS clients to access to medical, support and personal services (such as shopping for groceries), which would have otherwise cost each individual \$10, and the province of Alberta \$50, each and every return trip. In reality, many of the seniors who did access this free transportation service would have forgone the service had they had been required to pay. For most CSRS clients, living without free transportation is likely to result in a crisis situation.

CSRS Outreach workers often assist seniors to submit tax returns. Without submitting an annual tax return Canadians are unable to access income support.

While outreach workers may discover opportunities for seniors to claim additional housing subsidies and other social benefits, accessing maximum benefits while able to

The CSRS Outreach program is supported by:



live at home will always be a less expensive proposition for the province. The alternative is housing a senior within an assisted living facility.

As an example, CSRS outreach workers assisted 80% of the total client group of 668 to access two hours a week of provincially-funded home care support (such as cooking & cleaning— see line 8) and two hours of subsidized home services support (such as nursing & physiotherapy—see line 9) in 2007.

As illustrated in **Table 1.**, both are cited as an increased cost to the province. Yet the combined total of both costs (\$4,259,476) is only slightly more (\$250,000) than the savings to the province that result from providing an individual housing subsidy rather than housing that same group of 668 seniors within an assisted living facility (i.e. \$4,008,000).

In addition, the increased cost of providing home care and services support (\$251,475) is also significantly less expensive than providing the police services, EMS support, hospital stays, transportation and other services that would be required if CSRS was not working with the 668 clients profiled in this case study. This is outlined in **Table 1**, lines 1-6.

Combined, the social value created from supporting vulnerable seniors by connecting them to resources and assisting them to live independently is **\$1,343,729 annually**. Based upon an investment of **\$430,000** per year, CSRS creates **\$3.13** in social value for every **\$1** invested.

Conclusion

As the CSRS outreach program is essentially crisis prevention, the program's SROI has not been projected into future years, only on an annual basis.

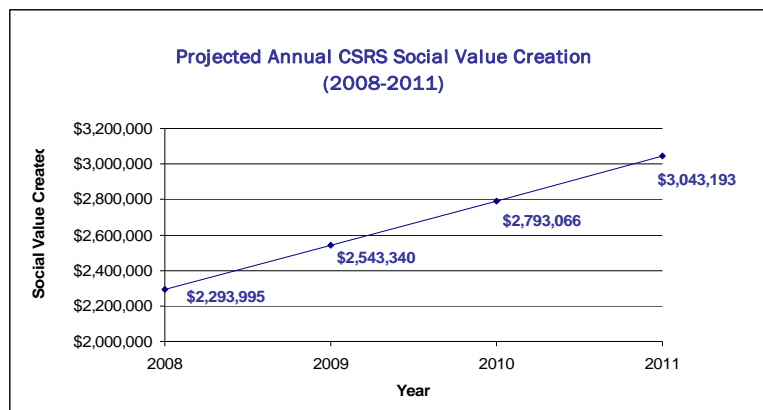
However, when provincial and national statistics are referenced, the Calgary Seniors Resource Society estimates that its client group will grow by 85 seniors annually, over each of the next five years.

Based upon the information presented in this case study, CSRS estimates its potential to create social value will grow to more than \$3 million annually, by the end of 2011 (See **Graph 1**).

Table 1: Social Value Created Annually

Social Value Created Annually - 668 clients			
SROI Indicators		Total Value YR 1	Notes
1	Police calls (avoided)	\$417,500	\$625/call * 668 avoided per year
2	EMS calls (leading to emergency review and care by Dr.)	\$171,342	75% of 668 avoided per year @ \$342
3	Admission to Emergency	\$115,731	75% 668 avoided per year @ \$231
4	Hospital Stay - 3 days	\$751,500	668 (75%) avoided per year (\$1,500 per stay)
5	Psychiatric admission for seniors	\$13,641	assumed at least one avoided - average hospital stay 65 days
6	Free Transportation (individual)	\$19,540	1954 round trips* 10 ea.
7	Free Transportation (public)	\$97,700	1954 round trip subsidy * 50 ea.
8	Tax Services	\$28,250	\$50 average cost H&R Block 565 clients served in 07
9	Difference in housing subsidies received (2880 vs 8800)	\$4,008,000	Stay in home - assume all have no deductions/income
8	Home Care Support (cooking, cleaning, light housework) 80% of 668 @ max cost (\$52hr)	-\$2,890,035	668 * 80% of GROUP, accessing 2hrs/wk, 52 wks/yr @ \$52/hr
10	Home Services Support (nursing, physio) 80% @ subsidized cost	-\$1,389,440	668 * 80% of GROUP access 2hrs/wk, 52 wks/yr @ \$25/hr
SROI Summary & Ratio			
A	Social Value Created (for 5 years)	\$1,343,729	Total of above
B	Total CSRS Investment in Outreach	\$429,844	Inflation rate: 12%
C	CSRS Investment per Individual	\$643	Assuming 85 new clients per year.
D	Social Return on Investment (SROI) Indicator	3.13	

Graph 1: Projected Social Value Created through CSRS ('08-'11)



The CSRS Outreach program is supported by:





Social Return On Investment (SROI) Case Study: Calgary Youth Justice Committee Program

Investing to strengthen society

Fast Facts

About the Calgary Youth Justice Society:

Vision: Calgary communities actively participate in the youth justice system to effectively reduce youth crime by focusing on the success of youth.

Web site:
www.calgariyouthjustice.com

Subject of SROI: Calgary Youth Justice Committees (YJCs)

SROI Overview: Youth Justice Committees offer a community-based approach to youth crime by involving the young person, their parents/family, victims, the justice system and the community.

YJCs help youth to understand and be accountable for the impact of their actions and to recognize the value of living a crime-free life.

1-yr SROI: \$1 to \$4.33

3-yr SROI: \$1 to \$8.85

By the Numbers :

- 300+ volunteers operate 24 YJC's in 140 Calgary communities
- 12,000 hrs donated annually
- 8,000 cases have been diverted from the formal youth justice system
- 90% rate of completion
- 80% are not charged again in the following 3 yrs
- \$15,000 collected (2007 only) in restitution to victims

Contact Details:

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"(The volunteers) were nice and understanding, and they told you the truth. Making sure that the future of kids is good and helping them make the right choice... It's better than going to court 'cause they would just tell you that you are guilty and you don't learn anything. (The volunteers) choose appropriate programs because they understand."

- Young person after successful completion of YJC sanctions

Background on Youth Justice Committees:

Section 18 of the Youth Criminal Justice Act provides an opportunity for citizens to become directly involved in the administration of youth justice by forming Youth Justice Committees.

These Committees are an alternative to the court system.

Community volunteers work with young people, their families, victims, the legal system and the community in order to find appropriate, meaningful consequences for a young person who has committed a crime.

Youth Justice Committees are a proven, effective response to youth crime as they hold young people accountable for their actions while at the same time giving them an opportunity to turn things around.

Over the past 12 years, 25 Youth Justice Committees have been established and are serving 140 Calgary communities. Nearly 8,000 Calgary youth have been diverted from the formal court system.

Statistics from the Solicitor General's Office show that 90% of young people successfully complete the requirements set out for them by a YJC, often including financial restitution from the offender to victim. Only 20% of youth have been charged again within three years.

Social Value Created

More than 300 volunteers donate 12,000 hours annually for Youth Justice Committees.

Volunteers design individual responses for each young offender, which correlate to the type of offence committed and the social challenges that they face.

The young people referred to the program are between 12-18 years of age, they have accepted responsibility for their actions, it is often their first or second offence. Their crimes are considered to be 'minor', such as theft under \$5k, common assault, property damage, mischief etc.

To make amends for their actions, young people are often asked to participate in community service, attend a program, make a charitable donation, or provide personal service or restitution to a victim.

Theory of Change

If young people in conflict with the law have access to a meaningful alternative to the formal justice system and an opportunity to feel supported by their community to learn from their mistakes, they are much more likely to succeed as law-abiding citizens.

Funding provided by:



Learning with:

SIMPACT
SROI Facilitated Learning Group (07-08)

Convened by:





SROI Case Study: Youth Justice Committees

The Social Value of a community-based approach to youth crime

Research shows that the sooner youth are engaged after committing a crime, the more directly they will relate consequences to their offence. YJCs expedite the process of young people being held responsible, thereby attaching meaning to the process and to the consequences given. The Committees are designed to provide a supportive and significant experience; one which greatly reduces the likelihood of re-offence.

The work of Calgary Youth Justice Committees creates social value in two ways:

- By providing an efficient, effective response to youth crime;
- By preventing future crime. 80% of our young people are not charged again within 3 years of completion.

Prior to being caught, most youth have not fully considered how a minor, first-time offence resulting in a criminal record can affect future employment and career prospects, education, and travel outside of the country. By successfully

participating with a Youth Justice Committee, young people can avoid a formal youth record.

Avoiding a criminal record keeps doors open to opportunities such as volunteering, admission to higher education, access to employment, and out of country travel which are all relevant to leading a productive life.

Without Youth Justice Committees, the 8,000 cases that have been managed by Calgary's YJCs since 1997, would have been dealt with by formal youth justice system processes. YJCs handle approximately 70% of the Extra-judicial Sanctions caseload for the entire city of Calgary.

*The situation which brought us to the YJC was not wonderful but the committee was great...they seemed to be the first group of adults who actually listened to *****. (The volunteers) were of extreme value, you could tell they cared about us and were intent on doing the right and best thing.*

– Parent of a young person

Calculating the SROI of Calgary Youth Justice Committees

In 2007, 701 young people in conflict with the law were diverted from the formal justice system to YJCs in the Calgary. Annually, the Calgary Youth Justice Society allocates \$162,000 of direct program expenses to the YJC program. The value of diverting 701 young people through YJC's rather than managing their cases through the justice system offers a social return of \$4.33, per dollar invested. Based on provincial government statistics, 90% of young people referred to the program (i.e. 631 youth in Calgary) successfully complete the requirements designed for them by the Youth Justice Committee.

If those same 631 young offenders had gone through the youth court, 28% (177 youth) within that group would likely have re-offended within a range of 2 to 4 more times. A further 16% (100 youth) would become chronic offenders, engaging in 5 or more incidents. That would represent a total of 277 re-offenders within the group

of 631 who successfully complete the YJC program.

Over the years, the re-offending rate among youth successfully completing the YJC program has remained

Table 1:

SROI Indicators Included:		Total Value YR 1	Notes
1	Police calls (avoided)	\$0	The annual SROI for the Youth Justice Committees has been calculated based ONLY upon the difference in cost between an alternative and the formal Alberta Youth Court System
2	Police investigations (avoided)	\$0	
3	Police attendance at court (avoided)	\$0	
4	Youth Court Process (avoided)	\$701,000	
5	Probation supervisor (not required)	\$0	
6	Cost of incarceration (avoided)	\$0	
Annual Social Value Created through YJCs:		\$701,000	constant at 20% (i.e. 126 of 631 youth). This is a 24% lower rate of re-offending than what would normally occur among young offenders who go through the court system.
Total investment in Year 1:		\$162,000	
Total number of youth in co-hort:		701	
Total investment per person:		\$231	
SROI Year 1:		\$1 : \$4.33	



SROI Case Study: Youth Justice Committees

Therefore, the SROI for Calgary's Youth Justice Committees includes the social value created annually by the diversionary program (see **Table 1**) and a lower re-offending rate achieved (100 youth).

As illustrated in **Table 2** below, we assumed that all repeat offences would occur within one year after youth participate in the YJC program, and that chronic offenders would be identified by the justice system by the end of year 3. While there may be additional, on-going costs associated with this

group of re-offenders, the SROI for the Youth Justice Committees does not extend beyond year three in order to keep the calculation as conservative as possible.

When the difference in re-offenders and chronic offenders is factored into the SROI for the Youth Justice Committees, the social value generated through the approach and ongoing success rate of youth Justice committees grows from **1 : 4.33** in the first year to **1 : 8.85** on a three year basis.

Table 2:

Social Value Calculation: Three Year, 701 Young Offenders, 100 re-offenders, 30 chronic offenders					
SROI Indicators Included:		Total Value YR 1	YR 2	YR 3	Notes
1	Police calls (avoided)	\$0	\$64,500	\$19,969	\$625 per call for 100 calls
2	Police investigations (avoided)	\$0	\$154,800	\$47,926	\$1,500 per investigation
3	Police attendance at court (avoided)	\$0	\$25,800	\$7,988	\$250 per attendance
4	Youth Court Process (avoided)	\$701,000	\$103,200	\$31,951	\$1,000 per young offender diverted to YJCs.
5	Probation supervisor (not required)	\$0	\$123,840	\$38,341	\$1,200 per year
6	Cost of incarceration (avoided)	\$0	\$100,000	\$100,000	\$100,000 per year (1 youth only)
Annual Social Value Created through YJCs:		\$701,000	\$572,140	\$246,175	Calculated to reflect inflation @ 3.2%.
Present value of social value created: (over 3 years):		\$1,433,429			Interest rate 3.5%
Total investment in Year 1:		\$162,000			
SROI Year 1:		\$1: \$4.33			
3-year SROI:		\$1: \$8.85			

It takes a Community

Community Volunteers are the heart of this program. When young people commit a crime, they need to be held accountable and understand the impact of their actions on themselves and others, but most importantly they need an opportunity to turn things around. Volunteers support young people to make amends and get back on track. As a result, everyone benefits!

The Calgary Youth Justice Society can't do it alone. The success of the Youth Justice Committee program in Calgary

is attributed to the involvement of many community partners, investors and government agencies offering programs and opportunities for youth, supporting program operations, and providing in-kind and financial support.

"It had meant so much to her (young person) to realize that three people from her community, who didn't even know her, would care enough to try to make a difference in her life."

- YJC Volunteer

For more information on



visit www.fcssaa.ab.ca

For more information on



visit www.simpactstrategies.com

For more information on



visit www.thecentrepoint.ca

For more information on



visit www.calgariyouthjustice.com

Social Return On Investment (SROI) Case Study: Families and Schools Together (F&ST)

Fast Facts

About Catholic Family Services: *Servicing and employing people of all faiths and cultures since 1957, our mission is “to strengthen ALL people and communities in the pursuit of wellness.”*

To that end, the agency provides a continuum of innovative and accessible services through a combination of counselling, community initiatives, school-based support programs, leadership development, and volunteer opportunities.

Services are offered to the most vulnerable people in Calgary and are not based on ability to pay.

By The Numbers:

- Catholic Family Service provided service to over 4,500 Calgarians in 2007.
- Almost 70% of service recipients report to not be of Catholic or other Christian faiths
- Families and Schools Together (F&ST) served 558 individuals in 10 different community sites in 2007.

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“F&ST gave us a chance to get to know the teachers at our kids’s school. I have noticed many changes in our family and we spend even more quality time together.” - A parent in Elementary F&ST

Program Background:

In Calgary, high stress and social isolation of families with children is becoming more commonplace. Parents work all day and arrive home late and tired, which limits their opportunity for meaningful contact with their children, to get involved in their schooling and to know their neighbors.

This reality can prevent strong and positive parent/child bonding. The absence of which is a major contributing factor to the stress and social isolation.

Families and Schools Together (F&ST) is a proven prevention program that strengthens the safety net for children through enhancing their relationships with their families, peers, teachers, school staff and other members of their community.

Social Value Created

F&ST addresses the needs of children and their families by building internal protective factors that will assist family members to identify warning signs of stress, isolation and poor mental health. The F&ST program focuses upon the following:

- Encouragement of positive parenting;
- Identification of caring support within local community;
- The importance of a caring and supportive school environment to children;
- The need for consistency at school/home;
- The development of positive social skills among children; and

- Promoting how stronger families contribute to safer communities.

By developing an awareness of the above, F&ST families become more likely to access support services if issues arise within their family.

Significantly, four to five years after involvement in F&ST, children of parents that have a history of tobacco use, alcohol abuse or involvement in drugs are significantly less likely to adopt these behaviours, despite the obvious use and

prevalence among adults in the home.

Theory of Change

If we strengthen communication and connections between parents/children and schools, then children are more likely to experience success in school and parents have increased participation in the community

How F&ST Works

F&ST is unique in that the program enhances a parents’ ability to be tuned in to their child’s development and to be consistent in their parenting. Acquiring these skills will in turn strengthen the resilience of the child.

The F&ST program occurs in three stages:

- 1) outreach and engagement, including home visits that invite parents to involve other family members in F&ST sessions;
- 2) eight to ten weekly sessions led by a team of parents who are F&ST graduates and specialized service providers who are prepared to assist participants to learn how to build stronger relationships with their children and across their communities; and
- 3) two years of follow-up through parent-led monthly groups (FASTWORKS) assist participants to maintain their relationships, i.e., with their children and across their communities.



SROI Case Study: Families and Schools Together (F&ST)

F&ST Clientele

F&ST began as a program for elementary school children and their families. Programming has evolved to serve families with infant children up to three years of age and recently has been customized for Aboriginal children and their families. Elementary F&ST and Baby F&ST are the subject of this SROI.

Generally speaking, participants in Elementary F&ST come from a variety of backgrounds. Group composition remains fairly constant.

In 2007, 70% children came from two-parent families. An average of 4 people per family attend the program.

Over half of the families reported income under \$30,000 (53%). 24% of the mothers and 33% of the fathers attending the program had not completed high school.

Each F&ST session has a carefully planned agenda that includes opening and closing traditions and a family meal.

Families get involved in activities that range from designing a family flag, sing-songs and lively exercises in communication to exercises that assist participants to address and describe their feelings.

Other agenda items include parent mutual support time, kids' time and parent-child play. The eight-week program concludes with a graduation ceremony that celebrates the successes of each individual family unit.

In 2007, 103 children attended the F&ST programs in Calgary-area schools along with their parents and extended family. While these children are not at the same immediate risk of family break-up as families involved in Baby F&ST, their experience of significant social isolation and poverty places every adult and child at-risk of involvement in ongoing problems such as family violence, substance abuse and limited education, diminishing their hope for the future.

Social Value Created

In the absence of a program like F&ST and Baby F&ST, families under stress may be challenged to reverse the trend of their deteriorating relationships on their own. This means that domestic violence will continue if it is already a factor and the family may routinely interact with police due to concerns about behaviour in the home.

When situations of domestic violence prevail, it is not uncommon for the woman to remove herself and her children from the situation for a time, drawing upon the services of local shelters. It may be necessary to place the child in foster care for a period of time or indefinitely, if the situation at home does not improve.

Children under stress will be noticed at school. If the stress continues unchecked, these children will likely require the services of a teaching assistant to ensure they do not fall behind in class.

In some instances, a child's behaviour will become so disruptive that their parent may be required to leave work in order to attend to a situation caused by the child. This will impact family finances, which can further contribute to the stress and other problems being experienced in the home.

The families of children described above require a new way of living and being together. They need support to ensure that their learning becomes a permanent,

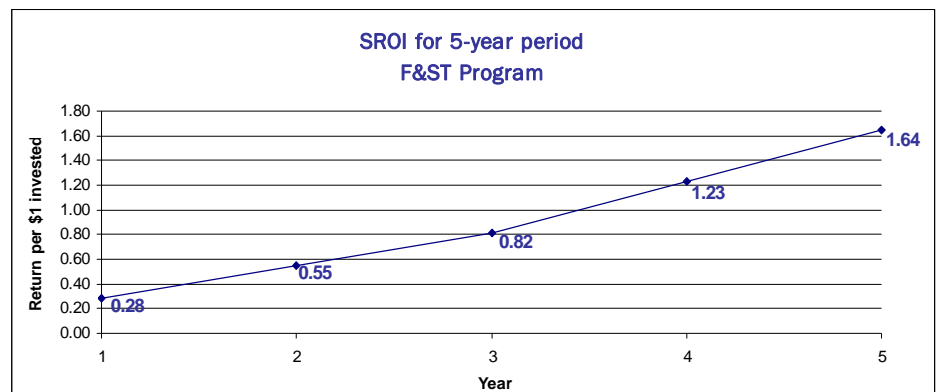
Case Study: Profile One for F&ST

Parent A, was a single parent residing in a low-income neighborhood with five children ranging from 5 to 13 years of age. She was unemployed and had numerous health problems resulting from current and past abusive relationships.

Parent A had minimal interaction with her children's schools and had no networks of support in her community. She had required intervention services in the past but had an interest in strengthening her parenting skills. She agreed to participate in F&ST when she was contacted through the school. During the program, Parent A exhibited increased confidence in her parenting. Her relationship with her children blossomed.

There was an increase in communication and play thereby

Graph 1: 5-year SROI for F&ST





SROI Case Study: Families and Schools Together (F&ST)

Table 1: Calculation of Social Value Created by F&ST

Profile 1: F&ST Program kindergarten - grade 4							
SROI Indicators Included:	\$\$ value per change	% of co-hort experiencing this change.	\$\$ value for co-hort	Notes - 103 children were involved in the FAST program in 2007.			
1	No longer required to need the time of an educational assistant	\$2,800	5%	\$13,843	Average time/cost for child requiring a teaching assistant is 5 hrs per week over 10 months @ \$14 per hour. 5 children no longer needed to access this time.		
2	Reduced stress on family leading to reduced need for police intervention	\$2,052	3%	\$6,341	Reduced stress, domestic violence was no longer a factor, regular monthly interventions by police were not needed @ \$342 per visit, per month. Assumed 6 months.		
3	Reduced stress on family relationships leading to use of shelters	\$595	3%	\$1,777	Three families reduced stress so that domestic violence was no longer a factor, therefore women's shelters were not used. Minimum stay, one week.		
4	Stress on child is reduced, which reduces the need for child welfare involvement	\$275	10%	\$2,748	Children under stress would access approximately 11 hours of child welfare support before either resolving the problem it being escalated. 10 children no longer needed this time.		
5	Stress on child is reduced, reducing the need for child to be placed in care	\$5,940	3%	\$17,743	Minimum stay would be three months. Minimum cost per night in foster care is \$66 per night. Three children were diverted from prospect of being taken into care.		
6	Parent no longer required to leave work regularly, therefore wages increase	\$1,632	5%	\$8,069	5 parents indicated they were no longer required to leave work and lose income. Likely on minimum wage, therefore \$ 8.50 per hour. Assuming loss of 2 days/month.		
7	Family participates in recreational activities	-\$16	25%	-\$407	Parents each pay \$5.28 for a \$25 dollar pass. 25 families accessed a pass in 2007.		
8	Substance abuse	\$1,414	20%	\$29,128	Older children do not become involved in substance abuse. This occurs 4-5 years after the program.		
SOCIAL VALUE CREATION SUMMARY TABLE F&ST:			YR 1	YR 2	YR 3	YR 4	YR 5
Social value created annually for co-hort:			\$50,113	\$51,366	\$52,650	\$83,094	\$85,172
Total annual investment in co-hort:			\$177,000				
SROI ratio over 5 years:			0.28	0.55	0.82	1.23	1.64
Present value of social value created:			\$290,709				

Profile One Case Study (con't)

lessening the previous pattern of conflict and reactive discipline.

The teachers noticed a significant change in the children. Their grades improved, attendance increased and they became full participants in the classroom.

Parent A experienced more positive connections with the other parents. She began to believe she could change her life. She asked the group for help with her resume and successfully obtained a job. She made the decision to access quality child care.

Over her time in FASTWORKS (a 2 year follow up program focused on community participation and building leadership skills), she became an advocate around barriers to families living in poverty. She continues to volunteer in her community and remains committed to making a difference.

Profile Two: Baby F&ST

Based upon the success of the F&ST approach, Baby F&ST was developed to meet the needs of young moms who were struggling with normal bonding with their infant children.

Baby F&ST participants are invited to include their child's grandparents or other extended family, in order to ensure their child experiences the most supportive environment possible.

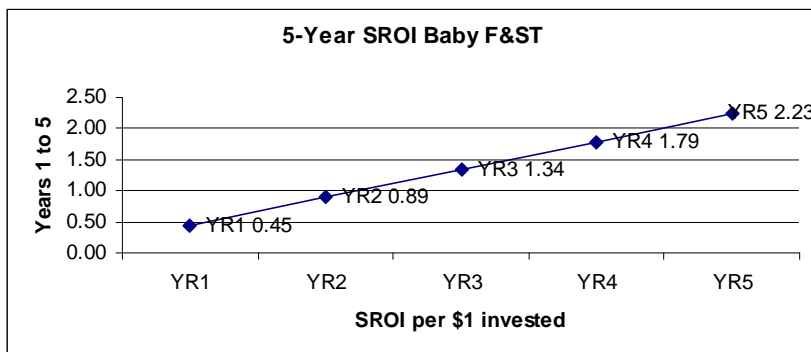
Baby F&ST Clientele

The 16 babies and young moms and their 41 extended family members participating in Baby F&ST (2007) shared common characteristics:

- young moms were between the ages of 13-23;
- the age of children ranged between 0-3 years;
- 48% of moms were heading single parent families;
- family income for 23% of young moms was under \$19,999;

- 28% of the young moms had employment income while 72% relied on income transfer payments or family support;
- grandparents or extended support network also often attended, invited as key figures with an active role to play in both the young mom and child's life.

Graph 2: 5-year SROI for Baby F&ST





SROI Case Study: Families and Schools Together (F&ST)

How Baby F&ST Works

Young moms are taught how to massage, play and bond with their child, and to create a more supportive family atmosphere with the assistance of extended family. At each session, participants move from individual to family based activities. Baby F&ST adapts to the adolescent developmental stage of the young mothers, while also building family integration. They learn baby massage with their babies under a year old, floor play with their 1-2 year olds and reading (literacy) with their 2-3 year olds. Participating families in F&ST have the opportunity for on-going support through involvement in FASTWORKS, a 2 year follow up program focused on community participation and building leadership skills.

Case Study: Profile 2 Baby F&ST

Parent B is a young mom, age 15, with a 2-month old baby. The biological father has minimal involvement. The young mom resides with her parents, and is dependant upon them for income support. Her relationship with her mother had started to deteriorate, prior to her becoming pregnant.

While adoption was initially considered, the young mom decided to keep her child. She tried to attend the local

community school but was ostracized by her peers. She attended Louise Dean School to complete her high school education and expressed an interest in being closer to her mom again. They agreed to attend Baby F&ST and experienced a far greater understanding of each other's role. The program gave her the strength to obtain counseling to rebuild the mother/daughter relationship. The grandmother learned that she was not a 'bad' parent, just a parent of a teen who ended up pregnant.

Table 2: Five-year Social Value—Baby F&ST

Profile Two: Baby F&ST							
SROI Indicators Included:	\$\$ value per change in Year 1	% acheiving change	\$\$ value for co-hort	Notes			
1 stronger parental bond	\$5,940	8%	\$7,888	reduced lilelihood of child placed in care (1 child @ \$66 per night. Infant daily cost would be higher.)			
3 better health for the child - less family doctors visits.	\$1,300	25%	\$5,200	less likely to need visits to family doctor, visits to clinics or hospitals - applied to one child in 2007 cohort.			
4 Positive interaction between father, mother and child, reducing domestic violence	\$595	8%	\$762	mom and child would otherwise end up in shelter - minimum of one week @ \$85 per night.			
5 grandparent has more positive relationship with young mom	\$900	8%	\$1,152	reduces inter-family friction. Grandparent less likely to need mental health services subsidized @ \$75 per hour.			
6 mental health of young mom increased	\$8,878	8%	\$11,364	young mon less likely to be suicidal or require mental health services - applied to one mom in 2007 cohort.			
Social Value Creation Summary Table			YR 1	YR 2	YR 3	YR 4	YR 5
Annual social value created for co-hort:			\$26,366	\$26,366	\$26,366	\$26,366	\$26,366
Total annual investment in co-hort:			\$59,000				
SROI ratio over 5 years:			0.45	0.89	1.34	1.79	2.23
Present value of social value created over 5 years			\$131,829				

Conclusion

F&ST and Baby F&ST are preventative programs that are composed of: a weekly program that assists parents to create stronger, more positive relationships with their children and up to two years of follow-up and support to assist families internalize their new way of being over the long term.

As a prevention program, F&ST changes behaviour and lifestyle choices over the long term. This means that the social value created by the program can be projected into the future.

As illustrated in Table 3, the annual SROI of F&ST programs grows as the families and children live with less stress and improved relationships. With multiple co-horts involved, the value returned in years 3-5 will offset years 1-2, as families evolve from direct program involvement into long term, permanent change.

Table 3: Five-year Social Value Average F&ST & Baby F&ST

	SROI Ratios				
	YR 1	YR 2	YR 3	YR 4	YR 5
Profile 1:	0.28	0.55	0.82	1.23	1.64
Profile 2:	0.45	0.89	1.34	1.79	2.23
SROI	0.36	0.72	1.08	1.51	1.94



Social Return On Investment (SROI) Case Study: Community Respite Program

Fast Facts

The Children's Cottage Society provides early intervention services to children and families through a continuum of programs which include:

- a crisis nursery;
- family support;
- community respite;
- volunteer day home/ daycare program; and
- healthy families.

The Crisis Nursery program provides 24-hour, short-term relief to highly stressed parents in crisis situations. Parents are linked to social agencies if they require counseling, family support or other services. The Community Respite Program offers short-term respite services to highly stressed parents who are parenting newborns.

In 2007, Children's Cottage:

- had more than 134 active volunteers.
- provided respite services for 1431 children and 1136 families.
- cared for 1102 children and 670 families in the crisis nursery
- provided childcare spaces for 57 children of 35 families.
- provided respite for 156 parents of new borns, and of 239 children in total.

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"After my wife left me and my infant son, I was very depressed. The program helped me by providing respite care, validating my parenting and allowing me time to get my life back together. I am so thankful for them."

Program Background:

In 1997, 92 babies under the age of six months were cared for by the Children's Cottage Crisis Nursery. The reasons for their admission ranged from exhausted parents, hard-to-care-for babies, mothers experiencing post-partum depression and parents experiencing mental health challenges.

Many of the parents would have preferred to have a support person assist them in their own home rather than be separated from their baby at such a critical time of attachment and bonding.

As a result, the Community Respite Program began providing in-home respite services in March of 1997. The intent of this program to provide in-home support to parents of new-borns who are having trouble coping. Parents can be referred by public health nurses or members of the community. Parents can request support themselves. The Community Respite Program is designed to support exhausted parents in order to reduce stress and prevent harm or neglect to children.

Social Value Created

Many parents of newborn children find themselves unexpectedly experiencing high levels of stress. Without affordable,

accessible child care respite options, already stressed-out parents find themselves in greater need of a break. This results in a growing fear of losing patience with their children, an increasing inability to cope with their child's behavior and greater potential for illness of

both parent and child. If the situation continues, families will often find themselves in crisis.

Parents in crisis become increasingly at-risk of hurting or neglecting their children. They may seek out use of crisis nurseries in local hospitals, access hospital emergency wards when in need

of medical attention, and often end-up requiring support or intervention by social services.

In-Home Respite Program Clientele

All parents with infants under the age of six months are eligible to receive respite services in their own home. Families that access the in-home services offered by Children's Cottage range in experience, age, income levels and family size. Realistically, the fear that results from feelings of stress and a sense of an inability to cope with parenting can impact any family at any time.

Parents needing respite are experiencing feelings of isolation due to feeling overwhelmed

Theory of Change
If parents of newborns who are suffering from sleep deprivation, post partum depression or exhaustion, have access to in-home respite services, they will have time to rest and take care of their own and their family's well-being. This will decrease the risk of child abuse and reduce the need for more intrusive interventions to protect their children.

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

SROI Case Study: Children's Cottage

by the demands of caring for a newborn. Most are in a state of exhaustion that has resulted from a lack of sleep. They are feeling overwhelmed by the need to maintain their home, care for their family and maintain broader relationships.

Case Study One: Anna (new mother at 36)

Anna had her first baby when she was 36 years old. She had always been a professional career woman who waited to have children until she was financially and emotionally ready.

Anna found herself feeling socially isolated as her husband was required to travel as part of his job. She found herself parenting alone up three to four nights every week.

Anna joined mom and tots groups in order to access support, however three months after giving birth she was diagnosed with Post- Partum Depression. Anna began to struggle with addressing the needs of her baby and found the baby to be more of an irritant than a joy.

Through the support of her community health nurse and a referral for respite services, Anna was able to access the Children's Cottage In-Home Infant Respite Program and received 12 hours per week of respite services. While the respite worker was in the home, Anna attended her post-partum support group, more easily accessed medical appointments and caught up on much-needed sleep. At the suggestion of their support worker, Anna's husband reduced his out of town travel in order to provide more support at home.

Within one month of accessing the in-home respite services, Anna began to talk in positive terms about her baby and her life in general. Anna accessed the respite services until her

baby was six months old and then continued on with the community resources referred by the program.

Case Study Two: Lori (mother of triplets)

Lori is a young mother who delivered triplets at 28 weeks. The babies were quite sickly and stayed in the neonatal intensive care unit (NICU) for three months. During this time Lori's three year old toddler was passed from family member to family member for child care so Lori and her husband could spend time at the hospital with the babies.

The stress for Lori and Dave was overwhelming. In addition to balancing work, hospital visits, home life and the needs of a toddler, Dave came down with a serious blood disorder. He too was hospitalized and Lori struggled to maintain a balance between home and hospital demands.

One of the babies was released from the hospital while Dave was in recovery period, prior to returning to work. However, Dave was not healthy enough to support Lori in caring for the baby so in-home infant respite was provided. The worker provided 4 visits per week for 6 hours per day. These visits were organized to supplement the support offered by family members. When respite services were available, Lori could go to the hospital or spend some much needed time with her three year old. Family members were available to spend time at the hospital with the other two babies and Dave could continue to recover.

With respite plan in place, Dave was able to recover without additional stress, and was back at work within six weeks. Lori felt more able to meet the demands of visiting and caring for the triplets as well as provide her three year old with the support and caring her needed.

Respite services were maintained by the family until the babies were six months old. The schedule of in-home support was adjusted each week as the triplets required many hospital visits to follow their growth and development.

The triplets are now a year old. They are developmentally on par and continue to meet key milestones. Their three year old brother Casey is happy at preschool. Dave is healthy and at work. Lori has learned to balance family life and staying healthy. She gets to the gym 2x per week and is involved in support groups with other parents who have experienced multiple births.

Table 1: Social Value Created—In-Home Respite Program

Annual Social Value Calculation: In-home Respite Program			
SROI Indicators Included:	Total Value YR 1	Notes	
1	Avoidance of use of crisis nursery in hospital	\$84,000	\$280 per day, average 3-day stay, at-least 100 appeals to crisis nursery avoided
2	Avoidance of need for emergency admissions at hospital	\$5,775	at-least 25 families did not ending up in emergency @ \$231 admission cost. Does not include social value created by avoiding overnight admission or other follow-up.
3	Avoidance of need for social worker time and resources	\$45,000	avoided at-least 5 hours of support per week over 12 weeks for 25 families @ \$30 per hour
Annual social value created		\$134,775	
Annual investment		\$82,000	
SROI ratio		1.64	

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



Social Return On Investment (SROI) Case Study: Family Diversionary Program Investing to strengthen society

Fast Facts

About Closer to Home:

Closer to Home Community Services (CTH) provides a continuum of programs designed to meet the needs of vulnerable children and families. CTH is known for demonstrating flexibility and creativity in developing programs that respond to identified needs within the community.

Services range from early intervention programs to group homes. They are consumer driven, community based and guided by a commitment to quality assurance, accountability, and measurable outcomes.

Closer to Home is fully integrated with community, municipal, provincial, and federal support systems. Formal and informal relationships allow a variety of resources to be accessed that meet unique needs of children and families within their own communities.

Web site: www.closetohome.com

Subject of SROI: Family Diversionary Program

SROI Overview: The Family Diversionary Program provides essential support functions that focus on reducing isolation and connecting families to the community. They provide education on parenting skills that help to prevent future problems among family members.

Three-year weighted average SROI:
\$1 : \$5.99

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“This program is educational and impacts our lives. It makes life easier!”

A participant in the Family Diversionary Program

Program Background:

The Family Diversionary Program (FDP) supports at-risk families by providing both specialized parenting education programs and organized, informal, networks that connect parents facing similar challenges.

Many of the children involved in the Family Diversionary Program are vulnerable, troubled and at-risk however, many of their difficulties are the result of underdeveloped parenting skills. Through Closer to Home, parents learn skills that are essential to keeping families together. These include skills such as learning how to manage conflict and how to establish achievable family goals that will contribute to the overall stability of the family unit.

Family Support Workers provide assistance, coaching and mentoring throughout this learning process. This increases the likelihood that at-risk families will become successful at setting goals, at achieving those goals in the short term and then maintain a goal-orientation into the future. This increases the likelihood they will stay together.

Social Value Created

Families that successfully engage with diversionary services reduce their reliance upon police services, walk-in medical clinics, medical interventions as a result of mental health problems, in-school

counseling and other counseling services. Successes achieved via engagement with diversionary programming enables the above municipal and provincial services to be reallocated to other Calgarians in need.

The value of increasing family stability can be projected for many years into the future. Without the learning and support offered by programs such as

the Family Diversionary Program, families will remain stuck in challenging circumstances for an indefinite period of time, or separated.

Children of strong families are more likely to become self-sustaining, contributing members of society in the future. Children and youth that are engaged through diversionary programs are less likely to enter foster care or to require future services provided by shelters.

Over a three year period alone, the social value created for one family stabilized through the Family Diversionary Program is \$182,400. This is a \$10 return on every \$1 invested.

Theory of Change

If parents at-risk of separation from their children learn how to set family goals, to find needed resources and to improve their parenting skills, they will be more able parents, and more likely to successfully keep their families together.

Family Diversionary Program Clientele

Three profiles of families engage with Closer to Home through the Family

Funding provided by:



Learning with:



SROI Facilitated Learning Group (07-08)

Convened by:



Diversionary Program. The first profile typically includes five to six families annually, families who are at serious risk of being separated for a variety of reasons. These families will likely be living close to the poverty line and will be at-risk of homelessness. The Family Diversionary Program is organized to engage these families through skilled counselors in their homes for up to 20 hours a week.

The second profile of a family who engages with the Family Diversionary Program is considered to be at medium risk of a family break-up. They do not require in-house counseling, yet access three to five training opportunities provided by Closer to Home each week. Their training will range how to manage a family budget, how to improve nutrition and how to cook healthy meals, or how to be an effective support when homework is required. Closer to Home will also assist

parents to assess whether they qualify for daycare subsidies or another form of social assistance. In 2007, this second profile group included approximately 240 parents and children.

The final family profile represents almost 750 parents and children. These families engage with the Family Diversionary Program less frequently, yet the services that they seek out have an important and positive impact on family life. Families within profile three will access one-on-one interventions, benefit from parenting classes, homework sessions and subsidized daycare. They may be referred to other community resources. Profile three families are supported in small but meaningful ways that seek to strengthen the family unit and to prevent them from progressing into the medium or high risk profiles.

Case Study— Social Value Created: Family Profile One

The following is a snapshot of a typical Profile One family, followed by an overview of how involvement in the Family Diversionary Program creates social value.

Alicia is a single mother of two children. The family lives in poverty, is at-risk of being homeless and the children may soon be placed in foster care as their circumstances are so unstable. Alicia has mental health issues and has been hospitalized before. She lives in constant fear that her husband may return, which would re-establish a too familiar cycle of domestic and family violence.

Alicia has a history of addictions to alcohol and illegal drugs. Worried about her children’s safety, Alicia continues to use alcohol/drugs, jeopardizing her routine of prescription medicine. She has difficulty providing the basic needs of her children. Her eldest is having behavioral problems at school, has begun stealing and is experimenting with alcohol. Alicia’s husband is not paying child support.

After accessing a women’s shelter, Alicia finds housing but the rent is almost 50% of her monthly income. Her family is again at-risk of homelessness. She continues to experience mental health problems and frequents walk-in clinics three times a week. She is admitted to the hospital three times in four months. The police are called to her home twice in two months as a result of dealing with her son’s escalating poor behaviour.

When Alicia first accessed the Family Diversionary Program, the Family Support Worker helped the family to identify goals to increase their security, their independence and

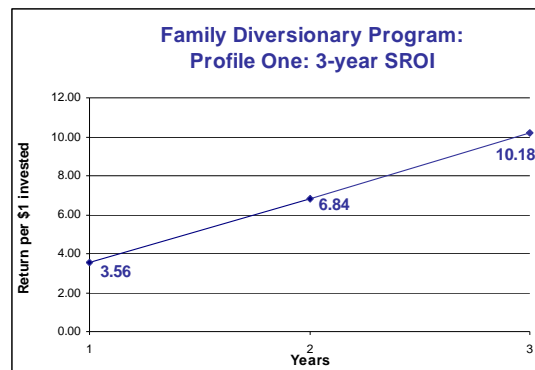
stabilize the family. Together, Alicia and her children worked towards developing routines to keep their home clean and everyone organized. The children were assigned chores and they agreed a family safety plan. They found a family doctor, with whom Alicia met once a week for five weeks in order to stabilize her medication. She found a personal counselor. Alicia also worked with her Family Support Worker and in-school guidance counselors to develop a school-based intervention program to address her eldest son’s behavior.

Alicia met with the Family Support Worker three times per week, for four weeks and twice a week for the next eight weeks. She kept in contact with the Family Support Worker for six months as she focused on achieving her goals.

At the end of the first month, Alicia had enrolled in a life skills program. Her son had experienced only one incident of problematic behavior at school. After three months, Alicia had enrolled in school. She and her son were in counseling. After six months, Alicia had a full time

job, with health benefits. She had moved her family into subsidized housing.

The opportunity to access a Family Diversionary Program Case worker stabilized their family situation. Alicia and her children no longer call upon emergency shelter services, police services, financial support through social assistance, intensive counseling, walk-in clinics, additional school resources, frequent hospitalization. The family stayed together.



Social Value Created: Profile One

The SROI calculation specific to Profile One families illustrates the social value associated with teaching the head of an at-risk family strong parenting and life management skills. Not only do these skills stabilize a family, they can also often contribute to enabling parents to find more secure employment in order to better care for their children.

This reduced the need to place children in foster care and will contribute to breaking other negative cycles that would otherwise continue indefinitely and affect the entire family. The SROI calculation projects value for three years, however in reality, the changes can be valued over a much longer period of time.

Profile One Social Value Calculation: Three Year Period, One Family				
SROI Indicators	Total Value YR 1	YR 2	YR 3	Notes
1 Police time avoided	\$2,052	\$2,093	\$2,135	\$342 per call, 6 calls avoided
2 Children not in foster care	\$36,500	\$37,230	\$37,975	2 children @ \$ 50 per day
3 No regular need for walk-in clinics	\$2,520	\$2,570	\$2,622	\$28/visit, 90 visits avoided
4 Reduced use of hospitals	\$14,000	\$14,280	\$14,566	\$500/day @ 4 weeks
5 Gov't - social assistance	\$4,942	\$5,041	\$5,142	No longer received
6 Gov't - subsidized housing (increased cost)	-\$3,600	-\$3,672	-\$3,745	Received subsidized housing
7 Gov't - receiving tax payments	\$7,092	\$7,234	\$7,379	Taxes paid
8 No more medication	\$343	\$350	\$357	No longer needing meds.
Profile One SROI Summary: Three Year Period, One Family				
A Social value created annually per family:	\$63,849	\$65,126	\$66,428	Calculated to reflect inflation @ 2.0% per year.
B Present value of social value created (per family over 3 years)	\$182,400			Interest rate of 3.5%
C Investment per family (in year one)	\$17,917			See E below. Divided by 6.
Profile One SROI Summary: Three Year Period, Six Families				
D Present value of social value created (for 6 families over 3 years)	\$1,094,399			For six families.
E Investment (for six families in year one)	\$107,502			\$57,000 invested in this program, plus \$50,000 taken into account for the investment into Profile Three.
F SROI Ratio (one year)	\$1 : \$3.56			
G SROI Ratio (over 3 years)	\$1 : \$10			

Case Study— Social Value Created: Family Profile Two

The second family profile is considered to be at medium risk of family break-up. These families are fairly isolated from their surrounding community and the parents do require parenting education on how to address problems in order to avoid them in the future. In 2007, there were 240 parents and children within Profile Two: 80 parents and 160 children.

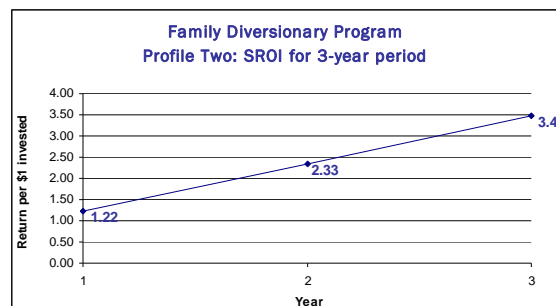
These families do not require in-house counseling, but do interact regularly with Family Support Workers as they access training that is organized in local community centres. On average, families within profile two regularly access three to five services offered through the Family Diversionary Program, each week. The programs available

range from involvement in early literacy, i.e. *Mother Goose*, parenting workshops such as *Common Sense Parenting* or the toy lending library. Teens have access to homework clubs and social support clubs such as *Girls Talk*.

Family Support Workers organize informal parent networks, providing isolated parents with a local network of people sharing similar experiences and concerns.

In 2007, there were 160 children and 80 parents within Profile Two. While

these families are not at the same risk of family break-up (as is the case among the families in Profile One), many of these 160 children have behavioural issues that make them likely candidates for foster care should the relationships



Social Value Created: Profile Two

with their parents not improve. Conservatively, Family Support Workers estimate that *at least* 10% of the 160 children would have otherwise been placed in foster care if their issues had not been resolved. Enabling 10 children to stay with their families for one year creates a social value of \$182,500 annually.

Profile Two Social Value Calculation: Three Year Period, 10 Children				
SROI Indicators Included:	Total Value YR 1	YR 2	YR 3	Notes
1 Children not in foster care	\$182,500	\$186,150	\$189,873	Calculated to reflect inflation @ 2.0% per year.
Profile Two SROI Summary: Three Year Period, 10 Children				
A Annual Social Value Created	\$182,500	\$186,150	\$189,873	
B Present value of social value created (over 5 years, 3.5% interest rate)	\$856,455			Return rate of 3.5%
C Total FDP Annual Investment	\$150,000			\$100,000 invested in this program, plus \$50,000 taken into account for the investment into Profile Three.
D SROI ratio (in year one)	1 : 1.22			
E SROI (over 3 years)	1 : 3.48			

As children who enter foster care will tend to remain in foster care until they become adults, the SROI ratio for profile two can conservatively be projected 1: 3.48 over a three year period. The SROI for profile two provides an example of the importance of investing in the group of 240 parents and children, in order to reduce the risk of a child being separated from his or her family. Improving

parenting skills and inter-family communication through counseling, diversionary and recreation programming and other methods to strengthen family bonds can have a lasting, essential impact on family strength and functionality over the longer term.

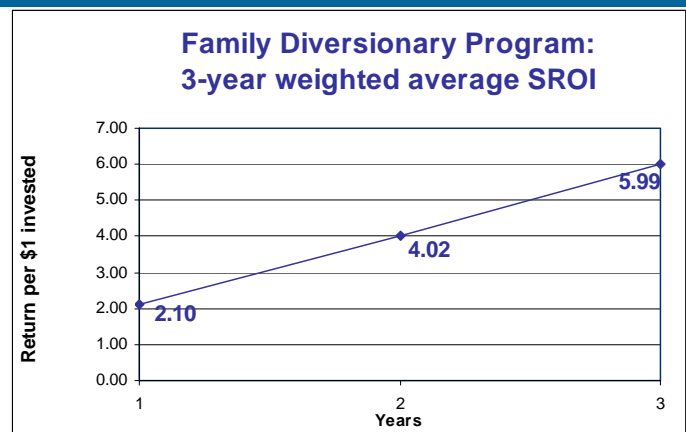
Social Value Created: Profile Three

The third family profile totals a group of 750 parents and children. They access more than 100 Family Diversionary Programs such as a clothing exchange and financial assistance programs regarding bill payments, tax filing and applications for day care subsidies. 50% of this group will participate one time only, the remainder will gravitate into profile two, possibly profile one, based upon their need. Essentially, the Family Diversionary Program Support Workers need to get to know the families in order to assess their needs. Therefore, the cost of providing services to families in Profile Three (\$100,000) has been divided equally and added to the investment into services for Profiles One and Two.

Conclusion

In order to portray a full picture of the social value created by the Family Diversionary Program, the investment into the families of profile three has been incorporated into the amount invested into profiles one and two.

The characteristics of each family profile are different and the 3-year SROI ratios are 10.18 and 3.48 respectively. The weighted average of the social value created by strengthening families at-risk is 5.99.



For more information on

visit www.fcscsa.ab.ca

For more information on

visit www.simpactstrategies.com

For more information on

visit www.thecentrepoint.ca

For more information on

visit www.closertohome.com

Fast Facts

About the Distress Centre: Since 1970, Distress Centre Calgary has offered a supportive place to call for anyone in crisis or needing information about available community services. All Distress Centre services are free to the public.

Web site: www.distresscentre.com

Subject of SROI: *Crisis Lines i.e.:* Main Crisis Line, Teen Line, Drug Line, Men's Line, Senior's Line and Out is OK Line

SROI Overview: The Distress Centre creates social value through the success of its telephone volunteers as they assist callers in crises to manage their personal situations by de-escalating the situation.

Major Funders: City of Calgary FCSS, United Way of Calgary and Area, AADAC, Calgary Health Region and Calgary and Area Child and Family Services Authority.

By the Numbers (2007):

- 89,903 phone calls from people in crisis received
- 66,997 information and referral calls managed
- 1,718 professional counseling sessions delivered
- 6,734 people reached through 258 public education presentations
- \$73,625 in emergency financial aid was distributed
- 191 online support posts from youth answered by youth
- Volunteers provided over 27,891 hours of service

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"The unique nature of a 24 hour service is such a gift to our clients. There are few options outside of office hours or in the middle of the night—the police or the emergency room is not usually appropriate for an emotional crisis. Having the Distress Centre to call provides peace of mind , for both clients and service providers, by knowing that there is someone there to listen and care for them when needed -Jennifer Finley, Program Manager, Street Outreach and Stabilization, Canadian Mental Health Assocn.

Background on the Crisis Lines

Highly trained volunteers, with professional backup, supervision and support, manage the 24 hour crisis lines offered through the Distress Centre. Anonymous and confidential — except in certain high risk situations — the call lines are open to anyone in crisis who is seeking a kind, listening ear, an outlet to vent about stressful circumstances, or is looking for other community-based resources.

The Distress Centre's services are enhanced by partnerships. To extend crisis intervention to the community, they offer direct links to a number of mobile response and community outreach teams, including the Calgary Health Region's Mobile Response Team, Wood's Homes' Community Resource Team, Social Services Response Team and the Calgary Senior's Resource Society program, SeniorConnect. Mobile response allows for in-person contact for individuals in need of more than phone support.

Social Value Created

The Distress Centre's crisis lines provide access to immediate support. The more quickly a crisis can be dealt with, the more likely it will be resolved or stabilized.

By having their concerns addressed immediately, callers are less likely to require services such as police, Emergency Medical Support (EMS), emergency room care, a stay

in hospital, or psychiatric care.

Distress Centre volunteers engage with callers directly. Once the situation is de-

escalated, the Distress Centre links callers to local organizations that can meet their specific needs. This ensures that those who are seeking help know where to find it and can access it as soon as possible.

Theory of Change

If persons in crisis have access to a supportive, immediate, 24 hour call-in centre that will explore, assess and validate their concerns and connect callers to other specialized services, callers are less likely to require intervention by emergency services and will live more successfully in their own communities.

Crisis Line Clientele

What constitutes a crisis is unique for each individual. Any person, from any walk of life, can experience a crisis situation which they are unable to cope with on their own.

The actual content of each call is as varied as the people calling in. Issues discussed range from relationships, addictions, mental health, loneliness/isolation, youth issues, parenting, grief/loss, sexuality, domestic violence, suicide, financial issues to many others.

Crisis, by nature, is destabilizing. It can induce a sense of panic and desperation; decisions made in this state can be impulsive and damaging. Success on the crisis lines occurs when a caller is stabilized or resolves their crisis. This may occur by working with a volunteer, being connected to additional support or being connected to emergency services.

In 2007, 89,903 crisis calls were received. As the lines are anonymous, we are not able to ascertain how many of our calls are

Funding provided by:



Learning with:



Convened by:



from unique individuals. However, it is clear that some callers require repeated support over time, which makes it possible to assess the number of callers using Distress Centre resources regularly.

These “frequent callers” make up approximately 30% of the total call volume on the crisis lines (26,971 calls in 2007). As a group, these callers have very complex needs.

They are a high-risk group and require higher levels of support than other callers. Every new call is a potential emergency and each is assessed for risk. Of that group, Distress Centre volunteers were able to de-escalate at least 30% of frequent callers in 2007, which represent 8,091 calls. Once de-escalated, these callers would then be re-directed to local support services.

Calculating the SROI of the Distress Centre

The SROI for the Distress Centre has been based upon 30% of calls, i.e. 8,091 Calgarians who were in crisis situations, which were de-escalated as a result of interaction with Distress Centre phone volunteers. While social value can often be projected over many years, the SROI for the Distress Centre has only been projected for the fiscal year relating to its annual funding, as a result of the immediacy of every situation.

As an example, a typical frequent caller is female and approximately 35 years of age. She has a chronic mental health condition in addition to a variety of physical health concerns. This caller profile frequently finds herself in crisis, which places her in a high-risk category. She has attempted suicide on a number of occasions. She lives alone and is rather isolated, having burnt bridges with family and friends as a result of her excessive need for support. This caller is a high user of a variety of services.

Profile One: (De-escalated Frequent Caller)		
SROI Indicators Included:	Annual Total	Notes
1 Police call-outs avoided	\$2,766,780	\$342 per call (8,091 calls avoided)
2 EMS call-outs	\$276,678	\$342 per call, accompanies police 10% of the time (809 calls avoided)
3 Emergency Room visits avoided	\$1,856,885	\$459 per visit, 50% of 8091 police calls will result in visit to ER.
4 Hospital admissions avoided	\$21,870	\$486 per day psychiatric admission to hospital, 45 days is average
5 2007 call-outs @ 360 calls	-\$411,480	The Distress Centre was not able to de-escalate 360 callers in 2007. Equals maximum cost should police, EMS and ER are be involved.
Social value created annually:	\$4,510,733	

Necessary support, such as a mental health therapist, a psychiatrist or a counselor can not always be available in the moment of need. Calling the Distress Centre crisis line enables her to access support as it is required, making it more likely that her personal crisis will be de-escalated. If this caller feels heard, validated and reassured she is less likely to act on suicidal thoughts and to require more expensive services like police, EMS, emergency room services and hospitalization.

Every time a police call-out is avoided, \$342 in social value is created. Ten percent (10%) of those avoided police call-outs (i.e. 809) represent the number of EMS

call-outs also avoided, as this social value relates to this high-risk caller group. In addition, experience shows that for every two police call-outs not required, one emergency room visit and assessment is avoided, creating \$459 each in social value. On average, a psychiatric admission to hospital is 45 days in length and costs \$496 per day. One avoided hospital stay represents more than \$21,870 in social value created, per person.

The Distress Centre SROI for 2007 has been calculated based upon 8,091 calls avoided, and assumes that its expert volunteers

successfully enabled one caller to avoid a hospital stay. The Distress Centre SROI also acknowledges that the Centre was not able to de-escalate 360 calls from this target group. The social return on investment in 2007 was \$5.16 per \$1 invested.

Profile One: (De-escalated Frequent Caller) SROI Summary	
A Social value created annually:	\$4,510,733
B Social value created: (per caller):	\$558
C Annual investment:	\$875,000
D SROI Ratio	5.16

Conclusion

While the dollar amount tells part of the story, much of the social value of the Distress Centre’s work is unmonetizable. By assisting clients to live successfully in their communities, they experience an increased sense of normalcy and a sense of freedom. They are more likely to make decisions in their own lives, providing a sense of empowerment. Families, friends and partners see their relationships take on healthier forms, whereby they feel less overwhelmed by the needs of their loved ones. They may experience a sense of freedom, as they are no longer required to stay in a demanding caregiver role.

The broader community gradually becomes more at ease and understanding of people with a mental illness, which in turn leads to less stigmatization and a greater ability for people within a community to care and support one another.



Social Return On Investment (SROI)

Case Study: Fair Gains

Investing to strengthen society

Fast Facts

About Momentum:

Momentum is a Community Economic Development (CED) charitable organization that works with people living on low incomes to develop productive futures. Momentum offers award-winning programs that assist people in developing financial, personal, social and professional assets. Momentum's programming includes skills training, business development, financial literacy, micro-lending, matched savings programs and computer literacy.

Web site: www.momentum.org

SROI Overview: Fair Gains is an individual development account (IDA) program decreases the likelihood that participants will need income support, subsidized housing and other services while increasing the likelihood they will earn a higher income, pay taxes, open new businesses and make consumer purchases.

Five-year SROI: \$551,800 or 1 : 3.08

By the numbers:

- Since 1999, over 900 individuals and families have participated in IDA programs at Momentum.
- Momentum's matched savings to date surpassed \$1.2M.
- 54 people have purchased their own home with their matched savings.
- In 2007, 89% of participants had increased their savings from \$23/month before the program to \$107/month after the program.

Momentum is a United Way Agency

Contact Details:

Lisa Caton
(403) 204-2659
lisac@momentum.org

"Momentum gave me hope – a real light in the dark hole I felt I was in. I cannot express my gratitude enough. Now I can help my family! Thank you."
- Participant, Fair Gains

Background on Fair Gains

Fair Gains is an Individual Development Account (IDA) program in which low-income participants learn money management skills while saving for an education, starting or expanding a small business, purchasing tools for work, or purchasing their first home. Every dollar saved is matched with three additional dollars.

First, clients open a bank account in their name and keep total control over the account. They then deposit between \$15-\$50 per month, for one year, saving up to a total of \$600. During this time, they attend regular workshops, peer group meetings and one-on-one consultation sessions learning how to manage their money. For one year, their savings are matched at a 3:1 ratio (\$3 for every \$1 saved). They then decide on and purchase an asset within two years of finishing the program using their saved dollars and the matching dollars.

Once the program is completed, the participant has gained money management knowledge, developed a savings pattern, accumulated a 3:1 match on their savings up to \$2,400, purchased a lasting asset, and developed their personal and social assets such as optimism, self-confidence, goal setting and future orientation.

After their first year of savings, eight participants can also apply to increase their savings from \$50 to \$150 per month and extend their savings period for an additional year and a half in order to save towards a down-payment on a home. Momentum will match these savings at a ratio of 5:1. Since 1999, 54 people have purchased their own home with their matched savings.

Participants can apply to Fair Gains if they are 18 or older, are living on a low-income, have minimal savings or assets, and are not full-time students.

Social Value Created

Asset-building programs reward saving, promote economic independence and create an orientation to the future for individuals living in poverty. People living on low incomes affect all of us through shortages of skilled workers, less taxes paid, increased government assistance costs, increased health care costs, a greater need for law and correction systems, and additional needs for special education systems. Fair Gains reduces poverty by helping individuals move to prosperity in a sustainable way.

Theory of Change

If people living on low-incomes participate in an asset-building program, then they are more likely to exit poverty as a result of learning how to effectively manage their financial circumstances, access to productive assets, opportunities for personal growth, and building social connections in the community.

Funding provided by:



Learning with:



Convened by:



The opportunities created because of Fair Gains decreases the likelihood participants will need government assistance, subsidized health care and other support services in the future. The likelihood participants will open new businesses, earn a higher income, pay taxes and make consumer purchases is increased. Participants change life patterns that would have otherwise been maintained for years. The social value of Fair Gains can be calculated well into the future.

Fair Gains Participants

The people that participate in Fair Gains live on low-incomes and find it hard to move forward in their lives. They come from a variety of backgrounds and circumstances, including

single parents, immigrants, women surviving domestic violence, Aboriginal persons and persons with disabilities.

Participants in the Fair Gains program tend to work at lower paying jobs, have difficulty managing their limited financial resources (e.g., increased debt), experience isolation and lack self confidence.

Most of the participants are working but they are simply not making a living. The participants who are on social assistance are having a hard time making ends meet and are living well below the poverty line. They are, however, seeking to make a change in their lives and are highly motivated to improve their situation, for themselves and their family.

Calculating the SROI of Fair Gains

Pioneered in the United States, savings incentive programs, Individual Development Accounts (IDAs) came to Canada in the late 1990s. Momentum has the largest suite of continuously operating IDA programs operating in Canada with over 900 people participating to date. Fair Gains is an IDA program for low-income adults in Calgary.

Studies on IDA programs indicate that each dollar invested in an IDA program can yield a return of approximately three dollars to the economy in the form of new businesses, additional earning and tax revenue, reduced social assistance expenditure and increased consumer spending.

When the value of changing life circumstances is acknowledged, even for only five years, the SROI of the Fair Gains Program is \$3.08 per \$1 invested.

In 2004, a graduate student at the University of Calgary published a Master's thesis, "Impact of the Fair Gains program on its Graduates' Quality of Life." In this thesis the pre/post income data showed a significant increase in overall earning for the Fair Gains participants.

Each year, approximately 42 individuals graduate from the Fair Gains program. Based on a conservative estimate of the income gains of the participants after the program, participants had an additional \$882,000 in income over the five

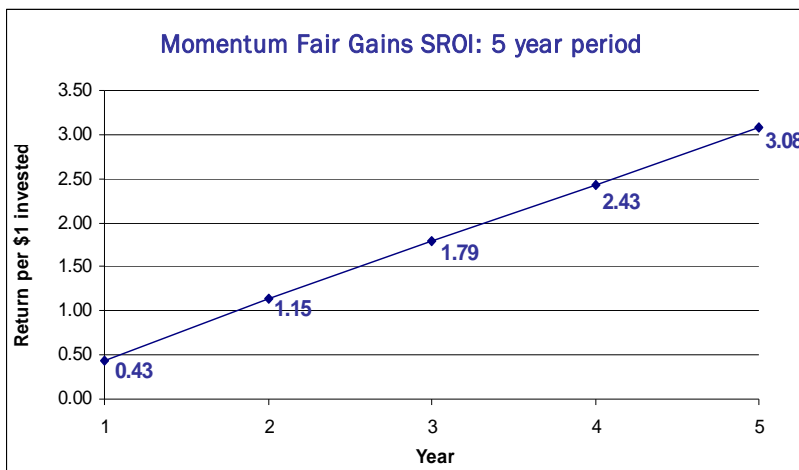
years after the program.

The income gains are achieved by Fair Gains participants in a number of ways. Many participants use their matched savings for education, employment training or certification. With increased levels of education, participants are able to find better paying jobs. Some participants use their matched savings to open or expand a small business, which also increases their income. Other participants use their matched savings for tools for work, which enables them to enter a

trade, and increase their earnings through a better paying job. Given that it takes time for people to move forward in their lives, it was assumed that full income gains for the participants would take place in Year Two after the program, with only 50% of the gains taking place in Year One after the program.

The Fair Gains research shows participants also exit social assistance.

Exiting social assistance for paid employment increases income of the participant as well as taxes paid at all levels. Every year, at least one person (assumed to be a single mother with one child) will no longer need income support after involvement in Fair Gains in Year One, and then a second person (also assumed to be a single mother with one child) exits social assistance in Year Two. Each family that no longer requires income support creates a social value of



\$12,000/year in social assistance payments that can be reallocated.

Calculated based upon their pre/post income levels, participants in the 2007 Fair Gains program are collectively paying an additional \$25,000 in taxes. As income gains have been mapped over two years, it was also assumed that increased taxes would reach their full amount in Year Two.

Participants can access up to \$1,900 in matched savings (\$1,800 + \$100 bonus) within two years of the program, once they have used \$600 of personal savings. On average, 80% of graduating participants access their matched savings. The SROI calculation below assumes that 50% access their savings in Year One with the remainder accessing their savings in Year Two.

There have been individuals who have participated in the second year of the Fair Gains program to save for homeownership, who have gone from living in social housing when they entered the program to owning their own home within

five years. The stability for their family, the pride in ownership, and the lasting asset of the home is a significant achievement. As one participant tells,

“It is an amazing feeling to be a homeowner. It has been my greatest accomplishment so far. Sometimes I still can't believe it. I have a great sense of pride of ownership. It has given me a huge leap and a wide base of knowledge in the area of my long-term goals for financial security. I can't express how it feels to know that I will be contributing to those goals on a monthly basis as opposed to being stuck in the rut of renting and seemingly never getting ahead. Thank you for helping make my dream of owning a home come true!”

*It has been assumed Fair Gains is not the only support accessed by participants to move forward in their lives - 50% of the social value has been allocated to Fair Gains, and 50% has been allocated elsewhere. For example, participants access employment counseling and training, case management supports from disability, mental health, immigrant, women's and Aboriginal serving organizations, and other community and family supports. Participants also access other Momentum programs.

Social Value Calculation: Five Year Period						
SROI Indicators Included:	Total Value YR 1	YR 2	YR 3	YR 4	YR 5	Notes
1 Increased Income	\$93,911	\$187,821	\$193,831	\$200,034	\$206,435	Based on pre/post income data of participants in program.
2 Decreased Social Assistance	\$12,000	\$24,768	\$25,561	\$26,379	\$27,223	1 person (single mom, one child) exits social housing Year 1, additional person (single mom, one child) exits in Year 2.
3 Increased Taxes Paid	\$12,557	\$25,918	\$26,748	\$27,604	\$28,487	Increased taxes paid based on pre/post income data.
4 Increased Assets	\$32,300	\$32,300	\$0	\$0	\$0	Fair Gains provides \$1900 in match dollars for participants to purchase productive asset. Assumes 80% of eligible graduates cash out, 50% in Year 1, 50% in Year 2
5 Decreased Subsidized Housing	\$3,600	\$7,430	\$7,668	\$7,914	\$8,167	1 family exits social housing Year 1; 1 additional family exits social housing in Year 2.
Social value created annually (per person):	\$154,368	\$278,238	\$253,808	\$261,930	\$270,312	Total of amounts above.
SROI Summary Data: Five Year Period						
A Social value created annually (per person):	\$154,368	\$278,238	\$253,808	\$261,930	\$270,312	Total of amounts above.
B Social value created (Momentum portion @ 50%)	\$77,184	\$139,119	\$126,904	\$130,965	\$135,156	Fair Gains is a part-time program. The assumption is that other factors are helping to move participants out of poverty. Therefore 50% is attributed to other influences in their lives.
C Present value of social value created (Momentum portion, over 5 YRS):	\$551,800					
D Momentum investment per group (occurs in YR1):	\$179,337					
E Momentum investment per group (occurs in YR1):	0.43	1.15	1.79	2.43	3.08	

For more information on



visit www.fcassaa.ab.ca

For more information on



visit www.simpactstrategies.com

For more information on



visit www.thecentrepoint.ca

For more information on



visit www.momentum.org

Social Return On Investment (SROI) Case Study: Eastside Family Centre

Fast Facts:

Woods Homes is a nationally accredited children's mental health centre offering a range of treatment services for children, youth and their families.

Our clients range from children with problems requiring simple remedies to more severe, chronic and complex issues. Our community mental-health and children's services offer day treatment, crisis counseling, residential and education services.

- Wood's Homes, a large organization with about 220 full-time staff and primarily funded by Calgary and Area Child & Family Services and the Alberta Health Services-Calgary Health Region, focuses on youth 11 to 18.
- Woods Homes operates 21 programs focused on care, treatment and education.
- Wood's works with other agencies and community resources to support more than 400 youth and their families each day.
- Of the 82 children supported by the Eastside Family Center in 2007-2008, 36% were either 5 or 6 years old and 64% were 7 to 12 years old.

Funders:

- Calgary & Area Child and Family Services;
- Alberta Health Services-Calgary Health Region;
- Calgary Board of Education;
- Calgary Catholic School Division;
- City of Calgary (FCSS);
- United Way.

www.woodhomes.ca

Having a counselor at our school allows us to work proactively with children and families before issues escalate into a crisis. Having the counselor available in the school makes her part of the school community. She is visible to the children and available to the parents within a trusting environment resulting in parents being more willing to participate in helping their child. The counselor also helps students and families remove the negative stigma of requesting mental health services. - Principal

Program Background:

The Woods Homes Eastside Family Centre ensures that qualified mental health clinicians are available to three elementary schools in Calgary, within an area of the city that is known to house a large number of at-risk, high-need families.

On average, the Eastside Family Centre supports 10% of a total of 860 children enrolled across three schools.

The families of children attending schools designated as high need are typically struggling with poverty, family breakdown and violence. Many are new to Calgary and to Canada. There are often underlying mental health concerns affecting the parents.

As a result, the children are also under a severe degree of stress. They develop behaviours that interfere with their ability to learn and negatively impact their social interactions. The Eastside Family Centre offers one-on-one support for children and their parents, in order to assist the family to resolve the situation that is generating stresses upon the child.

Social Value Created:

The Eastside Family Centre creates social value via interventions that assist children to develop coping skills when their family situation might be in transition or has been altered as a result of separation, divorce, sickness or death.

Without this support, children will often behave inappropriately, present themselves with anger or begin to withdraw from their family

members and from their school community. A child that is not communicating with family can start to cause severe disruptions at home, which can cause their parent to miss work. Often, parents will take their child to a walk-in clinic in the hope that a doctor will be able to diagnose and treat the problem.

Theory of Change

If the parents of children struggling at school as a result of emotional stress at home, have support and counseling to rectify the issue causing the stress, their child will be better able to succeed at school, and more significant emotional, developmental and scholastic problems will be prevented.

Increased stress at home increases the risk of family violence, which may require intervention by social services and increase the likelihood of a child being moved into foster care. If disruptions at school continue, a child may be moved to a

special classroom.

The Eastside Family Center helps families to identify and then to address significant family stresses. This approach prevents problems from becoming extreme, therefore from requiring more intensive intervention from child welfare, special education class time and often more expensive interventions through the healthcare system.

Parents are supported to improve their parenting and coping skills. They are connected to community resources geared to stabilizing and improving their circumstances. These changes will have an important and positive impact on their children.

Children are supported as they learn to manage their stress while at school. This improves their social skills and their ability to interact positively with teachers and peers at school.

The Eastside Family Center offers timely, accessible, cost-effective and preventative services. The annual social value ratio resulting from the work of the Center is **1 to 4.05**.

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

Clientele:

The children referred to the Center are between 7–12 years old. Their families are often single-parent or blended families that are experiencing some degree of family discord. There is usually more than one child in the family.

All parents report significant stress related to the behaviour of their children. Many have been forced to reduce their hours at work, or to remove themselves from employment altogether, as a result of the child's behaviour.

Almost all families have utilized the emergency services at the Alberta Children's Hospital, seeking solutions to their children's behaviour. 50% of families are known to child welfare due to concerns about their children. Additional challenges being faced by parents include poverty, addictions and mental health concerns.

Case Studies - Eastside Family Center

A single mother of 2 children was struggling with parenting, as she upgraded her education and was integrating a new partner into her home. Her nine year old son was becoming prone to emotional outbursts that resulted in calls to the police and child welfare.

Eastside supported both mother and child as he lived in foster care for a short time. His mother learned new parenting skills and became confident setting boundaries with consequences. His teachers were taught to support him to manage his anger or stress in the classroom. Together, the family had counseling in order to successfully adjust to the new adult in the home.

Today, this boy is fully integrated into a regular classroom. He has few outbursts. He and his mother have new tools to manage their relationship. The family reports improved communication and successful problem solving .

A six year old girl was suffering from anxiety such that she had difficulty getting to school and staying at school for the school day. She was withdrawn from her peers, isolated on the playground and in the classroom and unable to focus on her work. Eastside discovered that her father had recently left the family, her mother

had moved the family in with her sister and had started a new relationship.

The Eastside counselors worked with the mother on creating stability and structure within the new home setting. This included spending time with her daughter as reassurance that the mother would not also disappear.

Her teacher was supported in helping this girl manage her anxiety at school. Within one month, the child had settled in class, made friends and the family environment had stabilized.

An eight year old boy and his younger sister were placed in the care of their father, whom they had not seen since the boy was two. While living with his mother, he had been exposed to drug use and was left to parent his younger sister.

The move to a new home and a new school was very difficult. The boy was defiant, rude, aggressive and uncooperative. Through Eastside, the children were coached within the school setting to help others see them as the good kids that they were. At home, the family was coached to acknowledge the changes experienced, their loss and the upsets of family breakdown and significant difficulties.

Both children came to understand how their behaviour impacted their family and classroom. They achieved more at school, were able to settle at home and to reduce the family's need for social services.

Conclusion

Wood's Homes Eastside Family Centre plays an important role in the day-to-day life of the three schools involved. As a counselor is regularly on-site, the children are familiar with the Eastside Clinic, which builds trust more quickly.

Disruptive classroom behaviour often reflects problems at home. By addressing both cause and effect, the child and family can be stabilized. This leads to greater success for the child at school and increases the likelihood of long-term stability for the family.

Table 1: Annual Social Value Create: Eastside Family Centre

Annual Social Value Created - WOOD's Homes				
SROI Indicators Included:	\$\$ value per change in year 1	% of co-hort experiencing change	\$\$ value of change	Explanatory Notes
1 Foster care avoided (minimum of 6 weeks)	\$2,376	30.0%	\$58,450	30% of 82 children would otherwise have gone into care.
2 Reduced need for emergency ward @ hospital (+overnight)	\$1,269	3.6%	\$3,746	3 of 82 children would have otherwise been admitted to emergency and kept overnight.
3 Reduced need for EMS & police call-outs	\$1,288	2.4%	\$2,535	EMS and the police would have been called out for 2 children, twice each ear.
4 No need for child to be educated in special classroom	\$15,000	12.0%	\$147,600	at least 10 children would otherwise have been enrolled in special needs classrooms.
5 Reduced use of walk-in clinics	\$75	20.0%	\$1,228	estimated 3 visit per year (\$24 ea.) by 16 families.
6 Reduced income due to absenteeism from work	\$19,200	7.0%	\$110,208	income no longer lost as a result of absenteeism due to child's circumstances
SOCIAL VALUE CREATED:			YR 1	
Social value created annually for co-hort:			\$323,766	
Total annual investment in co-hort:			\$80,000	
Annual SROI ratio			4.05	



Social Return On Investment (SROI) Case Study: Mary Dover House

Investing to strengthen society

Fast Facts

About the YWCA: YWCA has been serving Calgary women and their families for almost a century. YWCA provides programs that help stabilize the lives of women and their children in need by supporting them to develop skills and abilities so they are able to contribute and benefit from healthy communities. Areas of focus include Domestic Violence Prevention, Homelessness & Poverty Reduction, Child & Family Intervention and Community Health & Wellness.

Web site: www.ywcaofcalgary.com

Subject of SROI: Mary Dover House

SROI Overview: YWCA Mary Dover House is a supported transitional housing service, which also enables residents to access job and parenting skill development through the YWCA.

Five-year weighted average SROI: \$1:\$2.70

SROI Partners: Calgary Urban Projects Society (CUPS), Victoria Order of Nurses (VON)

By the Numbers (2007):

- 253 women were residents (emergency dorm & transitional housing combined)
- 206 women accessed transitional housing
- Average stay in transitional housing was 3.7 months
- 104 children were residents with their mothers
- Of the 184 women who reported annual income, 158 (86%) reported less than \$15,000 year
- Residents accessed 3,935 hours of group and individual counseling
- 786 volunteer hours were donated by 133 volunteers

Contact:

Diane Blood
(403) 262-0482

“A woman shouldn’t have to chose between housing and abuse.”

- Carolyn Goard, Director of Services, YWCA Calgary

Background on Mary Dover House

Mary Dover House provides safe and affordable housing for women and their children who are in crisis or transition.

Experiencing domestic violence is often the reason that a woman seeks shelter for herself and her family. In Calgary, many women will return to an abusive relationship as a result of the lack of affordable housing.

Mary Dover House has six on-site emergency beds and 82 transitional beds. Private and shared accommodation is provided for up to one year for women and their children, depending on need and availability. With residency, women can access the continuum of YWCA services targeted at reducing homelessness and local poverty.

Social Value Created

Mary Dover House residents have an opportunity to become emotionally and economically self-sustaining. As a result, their need for emergency response systems such as the police, emergency medical services (EMS) and emergency shelters is significantly reduced, if not completely eliminated.

Their families are stabilized and no longer require the involvement of child welfare. This means that essential and scarce

services such as the police, EMS etc., can be more readily available to other Calgarians in need.

Mary Dover House residents access YWCA programs that seek to develop new skills and much-needed confidence to enter, or re-enter, the workforce. Women that transition into employment become tax-payers,

thereby contributing to the provision of the essential services that they once relied upon.

Mary Dover House residents not yet ready to work move to secure and stable subsidized housing, enabling them to keep their families together. The opportunity to access Parent Link contributes to important improvements in their parenting knowledge and skill.

Mary Dover House Clientele

Women residing at Mary Dover House are typically unemployed or underemployed. They have experienced numerous challenges in their lives including domestic violence, sexual abuse or exploitation, addictions, mental health and physical health issues.

Many have limited education as a result of living in poverty and/or experiencing homelessness. Many homeless women

Theory of Change
If women who are experiencing domestic violence have access to stable and secure transitional housing, they are more likely to recognize available support, access services, set goals to change their circumstances, and stay motivated in their quest to become emotionally and economically self-sustaining.

Funding provided by:



Learning with:



Convened by:



access social assistance but their income remains below the poverty line and they are unable to access secure and stable housing.

Many employed women, often with children, remain in poverty and are homeless. Without secure and stable housing, steps toward greater economic and emotional self-sufficiency are even more difficult to take.

Studies clearly show the effect of poverty and homelessness on children is profound. Children who experience poverty and homelessness are at significantly increased risk of mental and physical health problems, are more likely to suffer abuse, be neglected, and ultimately to become delinquent themselves.

Links to Essential Services

Women who come to Mary Dover House are at critical

turning points in their lives. They need individualized support to achieve the goals that they themselves have identified as essential to improving their personal and familial circumstances. Residency at Mary Dover House enables routine engagement with counselors, access to skills training and the support that is often essential to a woman who will be successful in her journey toward economic and emotional self-sufficiency.

At Mary Dover House, residents are linked to the YWCA network of services. These include individual counseling, child care, courses to develop new employment skills and parenting skills and access to individualized wellness services. 57% of Mary Dover House residents reduce their reliance upon social assistance, increase their employability, become more effective parents and are better able to contribute to their communities and to broader society.

Calculating the SROI of Mary Dover House

There are four general profiles to describe the 206 women who were residents of Mary Dover House in 2007, and three types of success stories. Of the women who accessed Mary Dover House transitional housing, 57% moved into stable and secure housing, and achieved self-sufficiency.

Profile One: Single Mother, Working

The first profile represents a woman who has left an abusive situation and has children. While a resident of Mary Dover House, she secures stable housing for herself and her family (average 1.5 children) and becomes gainfully employed. For every dollar (\$1) invested in women within this profile, Mary Dover House and YWCA programs create \$2.35 in social value for the City of Calgary over a five year period. More than \$45,000 is invested in each woman within profile one, an amount that reflects the cost of their residency, the skill development programs they access and the cost of their participation in Parent Link. **Table 1** on page 3 offers a detailed description of the indicators used to calculate the SROI ratio for this group.

In 2007, 15 women achieved their goals of employment and stable housing. Mary Dover House/YWCA, the Victoria Order of Nurses (VON) and the Calgary Urban Project Society (CUPS) contributed equally to each woman's progress therefore all social value totals have been divided by three. In addition, the Calgary Interfaith Food Bank regularly supplements all Mary Dover House residents' food supply with staples such as flour, sugar and a variety of canned goods.

The SROI calculation specific to profile one includes the

value created through learning skills that lead to employment in addition to the intangible value of achieving increased feelings of security, self-confidence and self-esteem. It also illustrates some of the monetizable benefits achieved by removing a woman and her children from the threat of domestic abuse and of keeping a family together.

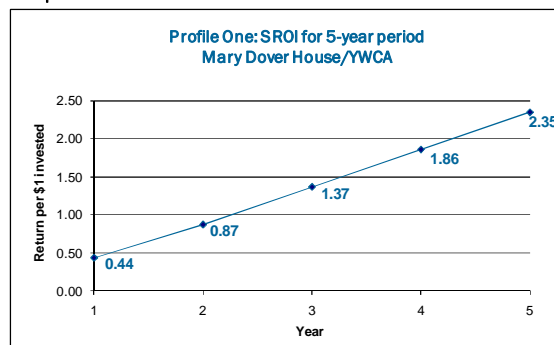
The successes of the 15 Mary Dover House residents representing profile one in 2007 have created social value by diverting the need for more than \$5.5 million in essential services in Calgary alone. These services can now be deployed to others in need.

As outlined below, the social value created has been projected over a five year period because these women would have remained in the same state of crisis or near-crisis indefinitely, had they not become a resident of Mary Dover House and accessed the services offered through the YWCA, CUPS and VON.

As calculated below, statistics suggest that these women will live in subsidized housing for the first two years, and then their income will be high enough such that they will no longer require housing subsidization at all.

For these 15 women, the investment made in Mary Dover House and YWCA programs in 2007 contributed to creating

Graph 1:



\$4.8 million in social value. \$1.6 million can be attributed to the role of Mary Dover House & the YWCA.

Compared to an investment of \$684,430, the five year social return on investment (SROI) ratio grows from 1: 0.44 to 1: 2.34, which is \$2.34 of social value created for every one dollar invested.

Table 1:

Profile One: Single Mother, Working Social Value Calculation: Five Year Period (One Woman Only)							
SROI Indicators Included:		Total Value YR 1	YR 2	YR 3	YR 4	YR 5	Notes
1	Child welfare	\$27,375	\$28,059	\$28,761	\$29,480	\$30,217	only daily costs (\$50/ 1.5 children per day)
2	Police calls	\$1,875	\$1,922	\$1,970	\$2,019	\$2,070	3 calls/yr @ \$625 /call
3	Police investigations	\$3,645	\$3,736	\$3,830	\$3,925	\$4,023	3 investigations @ \$1,215
4	Hospitals - Emergency	\$840	\$861	\$883	\$905	\$927	3* \$280 per visit
5	Hospitals - 3 day-stay	\$500	\$513	\$525	\$538	\$552	too low, TBC
6	EMS Calls	\$2,259	\$2,315	\$2,373	\$2,433	\$2,494	3*\$342 per call
7	Social Assistance	\$7,188	\$7,368	\$7,552	\$7,741	\$7,934	monthsupport: \$578 (1 adult 3 children) *12
8	Subsidized housing	-\$3,600	-\$3,690	\$0	\$0	\$0	LESS - \$317 (subsidized housing) * 12 - TWO YRS only
9	Total income is \$26,880. Increased income is:	\$16,092	\$20,700	\$24,636	\$24,366	\$24,975	\$14/hr * 40 hours*48 weeks (= \$26,880 total income) LESS (-) support payments (\$10,992) Increased wages to \$16 in year 2 and \$18 in years 3-5.
10	Taxes paid	\$3,737	\$3,830	\$3,926	\$4,024	\$4,125	AB - exempt on first 15,435, and 10% on remaining = \$1,145 + Federal after \$9,600 @ 15% = \$2592
Profile One: Single Mother, Working SROI Summary: Five Year Period (One Woman Only)							
A	Social value created annually:	\$59,911	\$65,614	\$74,456	\$75,431	\$77,317	Calculated to reflect inflation @ 3.2%.
B	Social value created per woman (Mary Dover House (MDH) portion):	\$19,970	\$21,871	\$24,819	\$25,144	\$25,772	Interest rate notes: Return rate approximate to a CDN 5 year retail bond return (3.2%)
C	Present value of social value created per woman (over 5 years, MDH portion):	\$106,652					
D	Total YWCA investment per woman (occurs in YR1)	\$45,629					
Profile One: Single Mother, Working SROI Summary: Five Year Period (15 women)							
A	Social value created annually - 15 women	\$898,665	\$984,217	\$1,116,834	\$1,131,471	\$1,159,757	Total of above, for 15 women.
B	Social value created 15 women (Mary Dover House (MDH) portion):	\$299,555	\$328,072	\$372,278	\$377,157	\$386,586	Total of above, for 15 women.
C	Present value of social value created for 15 women (5 YRS, MDH portion):	\$1,599,781					Total of above, for 15 women.
D	Total YWCA investment in 15 women (occurs in YR1)	\$684,435					Total of above, for 15 women.
E	SROI attributed to MDH / YWCA (over 5 years)	0.44	0.87	1.37	1.85	2.34	

Profile Two: Single Mother, Not Working

The second profile of success relates to the group of women who escape an abusive situation, secure stable housing themselves and their families (1.5 children on average), but do not immediately move into employment.

In 2007, 17% of Mary Dover House residents represented profile two and successfully moved into a more stable and secure situation. These 43 women accessed parenting skills training through Parent Link. An investment of \$619,685 was made in providing services to this group, which resulted in an SROI ratio of 1 : 4.43 or a \$4.43 return on every one dollar (\$1) invested.

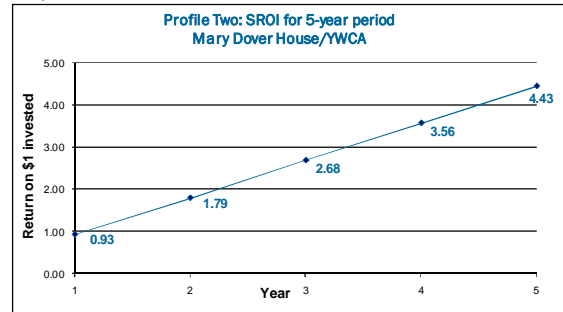
The total social value created by assisting these women to move into secure and stable housing, is more than \$8.2 million. As with profile one, the social value of the achievement of the women within profile two was projected over a five year period. The

total was again divided among three partners, with the portion attributed to Mary Dover House and the YWCA at \$2.7 million.

The higher SROI ratio is a factor of the larger number of women within this profile and that these women are not accessing job skills training. The individual investment is approximately one-third of that required for profile one. The SROI calculation reflects the reality that many crisis-oriented services provided by the City and Province are no longer drawn upon. It does not include increased income or taxes paid as a result of an increase in earned income. The as-

sumption has been made that the family remains in subsidized housing indefinitely.

Graph 2:

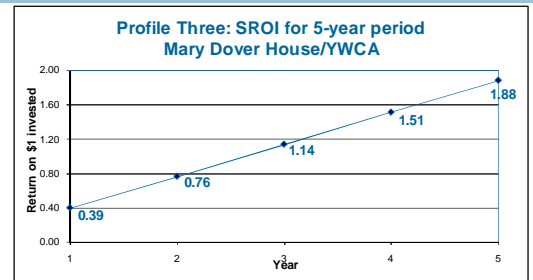


Profile Three: Single Woman, Not Working

The third profile of a Mary Dover House success story represents a group of 85 women that have no dependents and demonstrate a variety of concerns that range from having experienced abuse and poverty, to health issues that range along a wide spectrum.

In 2007, \$914,940 was invested into assisting the women within this profile to find safe and secure housing, creating social value that grows from \$0.39 in year one to \$1.88 by year five.

Graph 3:



Profile Four: Woman Not Transitioned

The life circumstances of the women who require transitional housing are complex. Despite the difficulties and hardships within their previous circumstances, not every woman will be ready to progress to the next step, even when presented with the combination of support and services offered by Mary Dover House, the YWCA, CUPS and VON. In 2007, 43% of 206 women did not successfully transition to secure and stable housing. There were 86 women within this profile and \$813,946 was invested in their efforts.

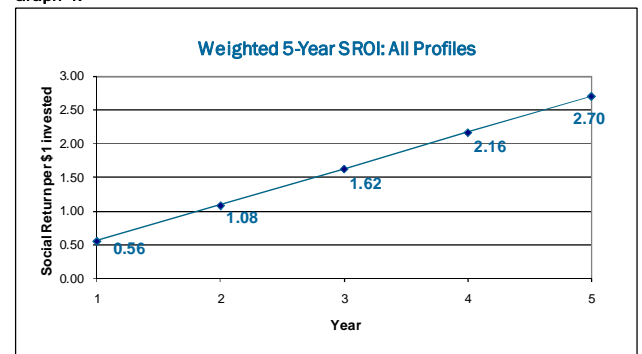
However, Mary Dover House / YWCA must be ready and able to invest in the possibility that every woman in crisis will successfully transition into profile one, two or three, in the hope of minimizing those who remain in profile four. For that reason, the cost of investing in the fourth profile has been added to the cost of investment into the first three profiles, in proportion to the number of women in each profile. That provides a more complete picture of annual investment into transitional housing, new job skills and strengthening parenting skills offered too all Mary Dover House residents in 2007.

Conclusion

In order to portray a full picture of the social value created by Mary Dover House and the YWCA, the investment made into all four profiles has been accounted for. The investment made in the women of profile four (women who did not transition into secure and stable housing) has been added to the amount invested to achieve the successes of profiles one, two and three.

As the three profiles of women are different, the 5 year SROI ratios are 2.35, 4.43 and 1.88 respectively. The weighted average of SROI ratios across the three profiles of women transitioned to secure and stable housing in 2007 through Mary Dover House is 2.70.

Graph 4:



For more information on



visit www.fcscsa.ab.ca

For more information on



visit www.simpactstrategies.com

For more information on



visit www.thecentrepoint.ca

For more information on



visit www.ywcaofcalgary.com

SiMPACT: SROI work done to date:

The Big Issue

<http://www.bigissue.com>

Ocean Music Trust

SROI Primer

<http://sroi.london.edu>

Vibrant Communities

Calgary - Universal Low Income Transit Pass

Closer to Home - Portfolio of 6 Case studies + Executive Summary

Catholic Family Services

Louise Dean Centre

Big Brothers & Big Sisters of Toronto

Mentorship Program

FCSS Case Studies

- Aspen Family Services
- Boys and Girls Clubs
- Calgary Seniors' Resources Centre
- Calgary Sexual Health Centre
- Calgary Youth Justice Society
- Catholic Family Service
- Children's Cottage
- Closer to Home Community Services
- Discovery House Family Violence Prevention
- Distress Centre Calgary
- McMann Youth, Family and Community Services Association.
- Momentum
- Peer Support Services for Abused Women (PSSAW)
- Woods' Homes
- YWCA of Calgary/Mary Dover House

About Social Return on Investment:

Social return on investment (SROI) expresses the monetary value of social and environmental benefit created through any type of activity.

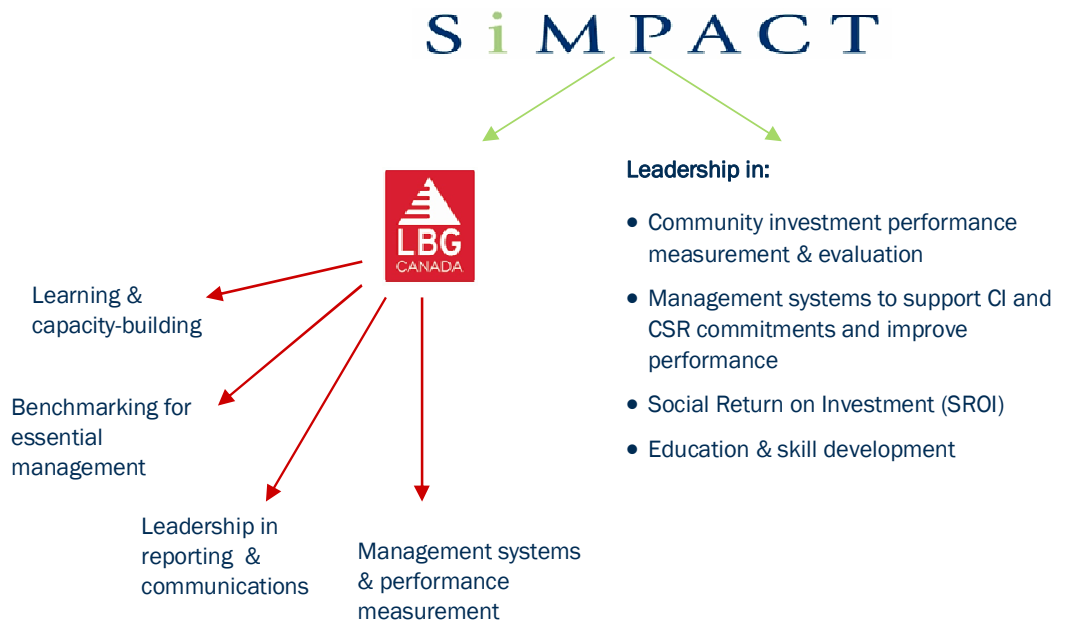
A SROI analysis can be used as a forward planning framework, for day-to-day project management as well as a tool to evaluate results.

SROI illustrates the value of enabling positive changes to a human or environmental circumstance by expressing the value of achieving that change in relation to the cost of investment.

As decreased and reallocated costs, increased income and taxes paid are monetized, the ratio focuses attention on the value of personal accomplishments such as learning new skills, increasing personal confidence and stability.

About SiMPACT Strategy Group:

The SiMPACT Strategy Group is a specialist agency in social impact management, measurement and valuation. Our clients seek to understand their impact on society because they care about their brands, the experience of their products & services and the legacy of their daily operations.



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