



SOCIAL RETURN ON INVESTMENT (Forecast SROI)

Supporting rural areas on health services
"Independently (not alone)"
(Poland)





1 The Social Return on Investment (SROI)

With the social return on investment (SROI) exercise, we attempted to identify and measure different types of outcomes farmers and disabled people obtained as a result of their involvement in social innovation; furthermore, we tried to recognise the role of involvement with the social innovation (its contribution) to the changes observable in several features and characteristics of individuals and organisations (institutional stakeholders).

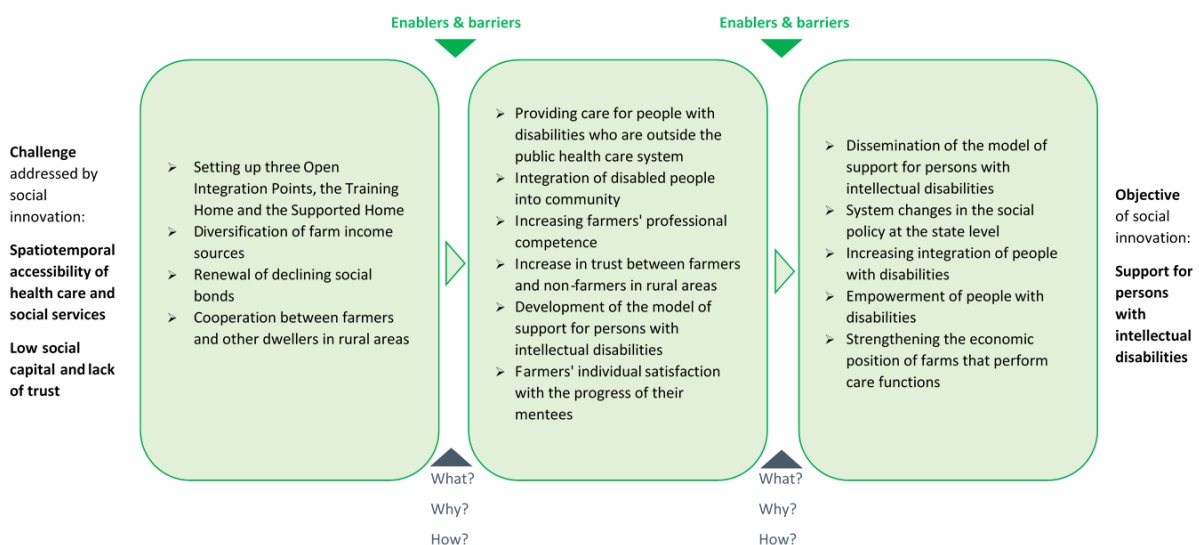
The farmers' well-being was assessed by collecting relevant data from direct interviews with them and with their family members. All the individuals were interrogated about changes in their transferable skills, agency, self-esteem, confidence, life satisfaction, sense of belonging, financial stability, etc., observable as a result of the farmers' involvement in social innovation.

1.1 Measuring change

Journey of change (JoC) aimed to identify and assess a range of short-, mid-, and long-term outcomes obtained as a result of the stakeholder involvement in the project/ social innovation (SI) addressing previously recognised and selected social challenges (insufficient access to health care and social services, weak cooperation).

The IRWiR PAN's team has collected the required data for the SROI analysis (mainly the assessments and different types of outcomes identified by parties involved with the SI). The data-gathering process was facilitated by KPODR and the SI's leader – PCPR. The online survey (questionnaire forms) was designed and provided by University of Gloucestershire (FARMWELL project partner). The survey was commented on and adjusted by taking into account the local context and the target-group specificities by IRWiR PAN afterwards. The data on social outcomes gathered from direct interviews and online questionnaires were supplemented by the financial data on investments provided by PCPR and KPODR.

Journey of Change





| Short → medium-term outcomes | Medium → long term outcomes |
|---|--|
| <p>Enablers:</p> <ul style="list-style-type: none"> • Cooperation of institutional partners • Understanding of local conditions • Experience in implementing and running care farms • European Union funds • Involvement of a large number of specialists: psychologist, physiotherapist, speech therapist, lawyer, nurse, counsellor, and other specialists hired depending on the needs of individual participants <p>Barriers:</p> <ul style="list-style-type: none"> • Legal obstacles: farmers had to legalize these specialised care farms as a non-agricultural economic activity • High demands on the farm owners who wanted to be involved in the project, e.g. the right psychological profile of the care farm owners, infrastructure available on the farm, involvement of animals • COVID-19 pandemic | <p>Enablers:</p> <ul style="list-style-type: none"> • Visible progress of Open Integration Points' residents (encouragement for further action) • Strengthening cooperation with the specialists • Personal relationships with the mentees • Caring and therapeutic skills • An easy-to-implement model of care for dependent persons <p>Barriers:</p> <ul style="list-style-type: none"> • Lack of financial sustainability |

1.2 Evidencing change

Concerning the data-gathering process, the initial survey questions fit quite well and they had to be adjusted to the local/ Polish context only to a certain extent. We have collected data for farmers and their families as well as for disabled persons and their families. In addition, data have been also collected for so-called institutional actors at local and regional levels, namely public social aid institutions, policy-makers regarding social issues, agricultural advisory services, and NGOs.

A large portion of data we have collected on the spot conducting field surveys, i.e. PAPI, observations and direct semi-structured interviews with (care) farmers and their families as well as with care farm users who are disabled people and their family members. We need to remember that the target group was intellectually disabled people of different levels of disability which is why we decided to come to Tuchola county and conduct face-to-face interviews with those people being assisted by the engaged caregivers and therapists instead of collecting data from online questionnaires. With the assistance of the project holder members (staff of the PCPR) the survey was arranged in a way that we met care farm owners and most of their family members at their farms (obviously, we were interviewing respondents in separate rooms). At care farms, we also met and talked to some of the disabled persons (in some cases with the assistance of the carers, and therapists depending on the level of disability) or we talked to them and their families at their homes. Some of the disabled people we interviewed in the PCPR. As far as it concerns institutional actors, most of them filled out questionnaire forms during the pilot, while the remaining part returned the forms by email.





Bearing in mind the purpose of utilising the social return on investment method, the related exercise was to identify and measure the social benefits from the "Independently (not alone)" project which is often neglected or underestimated, and thus underrated. Benefits represent different domains and aspects such as professional, interpersonal, and transferable skills, self-esteem and self-confidence, cooperation abilities, etc.

Given the local context and the specificity of the social innovation, SROI data were gathered through paper and pencil interviews (PAPI) – carried out during both the fieldwork and the pilot workshops, and the online survey.

The data for institutional actors were collected for two subsets – actors at the local and regional levels and their counterparts at the national level. Some questionnaire forms were completed during the pilot's workshop, while the remaining ones were later filled out online.

For the SI's benefit period (start: June 2019, end: October 2022), the major expenses were as follows:

- **Project initiation costs** (incl. capital items, office furniture, and equipment as well as other items) amounted to 21 930,79 Euro. All of them were one-off costs.
- **Project delivery costs** (incl. salaries, travel, support, and other costs) amounted to 565 041,07 Euro. Regular (monthly costs) prevailed.

There were neither organisation establishment nor other types of costs incurred.

On the other hand, the financial support sources were as follows:

- **Funding: Donors / investors / sponsors / beneficiaries** (incl. EU and national grant support, in-kind contributions) amounted to 1 307 373,27 Euro.

Farmer interview questions

Q (FW): What do you think about the method of quantifying social outcomes? [question reformulated: Do you think that the project brought something that could be measured?]

A (Elisabeth Farmer 1): ...Yes, I would just like these people, these small groups in these farms. They are feeling good. Maybe it's because they feel like they live here. But the fact is that it consumes a lot of my time. I do not want to say that at the expense of the family, it is not. But actually, it is so that at any time they can call me. But it's also vice versa that if I remember at 8 pm and that tomorrow, listen, we'll be half an hour later, they'll answer that call too, right? As for the project, it should be a small group.

Q (FW): ... What do you think about the social return created? [question reformulated: What do you think about the social value created thanks to the project?]

A (Margaret Farmer 2): ...Independently not alone project is simply brilliant. It shows us how it can all work together nicely, that work makes a person, simply, that they can find themselves at work, on a farm even more so. And for everyone, there is something, something to capture.





A (Elisabeth Farmer 1): ... In general, these are the girls who came to me, those two years ago. They are completely different people, this mouse who could not even introduce herself, yes, and today she can already manage her own, what in general shyness, barriers, one would not dare. They laugh so much that I have the power of compulsion, to fly a paraglider...

Q (FW): Does it reflect your feeling(s) about the value of social innovation?

A (Elisabeth Farmer 1): ...So I don't consider it a job either, but I think it's more meaningful for them than if we sit here and do any handcraft that they can do for themselves at home, they learn how you can make money, from what, where, what is an easy cost, whether flowers or floristry or whatever.

1.3 Valuing change

1.3.1 Forecasting SROI findings

The summative forecast SROI Impact Map for the Independently Not Alone Care Farming Social Innovation is given in Table 1 below. This estimates the impact of the proposed wider application and scaling up of the social innovation over a foreword looking 5-year period (2023-28). Over those periods a range of wellbeing impacts are generated for 6 farmers, and 18 farm family members, 80 people with disabilities and 44 family members, 16 therapists (care givers), and 32 partner organisations and network members. Outcomes were spread across 4 impact pathways, with value generation dominated by Personal (46%) and Economic Wellbeing (31%) impacts.

The prospective SROI model indicates that investment in the project has the potential to generate a 264% return on the investment over the five-year period. Those benefitting from improvements in wellbeing include farmers (and their families) operating the care farms, the individuals with disabilities (and their families) attending the care farms and society more widely. The model output reveals that on average each Euro invested in the project could generate up to 2.64 Euros of social value.

The Personal Wellbeing impact pathway generates almost half of the total outcome value (46%) for the proposed roll out of the care farming innovation. The high level of personal wellbeing is not surprising as the major focus of the project is providing support for those with disabilities. The vast majority of the outcome value is linked to a composite set of indicators measuring beneficial improvements in: 'Increased agency and resilience; self-esteem and sense of purpose; increased independence; and, increased sense of happiness and feeling more satisfied with life overall' for those with disabilities and their immediate family members. It is also worth noting that farmers and farm family members and therapists also benefit through improvements in 'life and work skills and in self-esteem', illustrating that the benefits of care farms are felt by a wider set of stakeholders.

The second largest category of outcome value (31%) is generated through the Economic Wellbeing impact pathway. Almost half of the outcome value generated by this impact pathway come from 'Reduced care costs', which directly benefits the families of those with disabilities, while around a third of the outcome value is derived through 'Enhanced capacity





for employment' which enables those with disabilities to engage in paid employment (which also leads to increased household income). An additional 15% of the outcome value can be attributed to 'Developed / skills competence and purpose through regular work' which directly benefits those with disabilities.

The Social and Community Wellbeing impact pathway generates only a relatively small proportion (6%) of total outcome values, largely because there is currently very little involvement of the local community with the care farms. The majority of outcome value generated through this impact pathway comes from value associated with 'Increased respect and understanding of farmers in the community'. However, it is also worth noting that a small proportion of the total outcome value is also generated through 'Increased social relationships with local community' for farmers, family members, and therapists within the Relational Wellbeing impact pathway.

The forecast model for the Independently Not Alone Care Farming Social Innovation also contains some outcomes relating to the institutional and networking arrangements that will be necessary to achieve the proposed wider application of the Social Innovation. As part of this process the 32 partner organisations and network members stand to benefit with respect to more effective and targeted service delivery; wider professional recognition of the care farming network; and more effective decision making at and between various levels of governance. This aspect of social innovation – the governance structures, partnerships and networks required to implement social innovation at various spatial scales, is an important – and often overlooked – aspect of grassroots social innovation highlighted by the forecast SROI model.





Table 1: Poland Forecast SROI Impact Map (SI: Independently Not Alone Care Farming – wider application)

| Impact Pathway | Outcome | Stakeholders (No.) | Indicator/s of Change | Outcome Change (%) | Financial proxy (Value €/Unit) | Present Value (€) | Present Value (%) |
|--------------------|---|--|--|--------------------|--|-------------------|-------------------|
| Personal Wellbeing | Increased life and work skills | Farmers (6); farm family members (18); therapists (16) | Enhanced life and work skills scale | 89% | (9) Cost of employability skills training in regular sessions with counsellor / coach (€877 per person p.a) | € 99,436 | 46% |
| | Increase in self-esteem | Farmers (6); farm family members (18) | Self-esteem resulting from care farming scale (Composite) | 54% | (6) Cost of Cognitive behavioural therapy (CBT) to build psychological resilience and self esteem (746 per person p.a) | € 51,318 | |
| | Increased agency and resilience | Disabled people (80) | Agency, independence and resilience scale (Composite) | 50% | (23) Cost of self-esteem course (€128 per person p.a) | € 38,214 | |
| | Increased self-esteem and sense of purpose | Disabled people (80) | Self-esteem and Sense of purpose scale (Composite) | 87% | (2) Wellbeing valuation of improved autonomy and control (€753 per person p.a) | € 166,907 | |
| | Increased independence | Disabled people (80) | Agency, independence and resilience scale (Composite) | 50% | (33) Cost of BSY professional development course in self awareness (€146 per person p.a) | € 111,714 | |
| | Increased sense of happiness and feeling more satisfied with life overall | Disabled person (80) | Life satisfaction scale (Disabled person and family members) | 73% | (7) Value of mental health component of Quality of Life Adjusted year (NICE recommend expenditure of QUALY is 30K) (€6,278 per person p.a) | € 1,167,509 | |





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|----------------------|---|---|---|-----|--|-----------|-----|
| Relational Wellbeing | Additional outcomes around collaboration, partnerships, networks etc | Farmers (6); partner organisations and network members (32) | Collaboration / networking Scale (Composite) | 77% | (15) Cost of a networking / training event and one hour of time devoted to networking at the average hourly earnings rate (€42 per person p.a) | € 67,848 | 17% |
| | Increased social relationships with local community | Farmers (6); farm family members (18) | Collaboration / networking Scale (Composite) | 77% | (28) Average annual household spend on recreation and culture (€1,796 per person pa.) | € 176,128 | |
| | Easier access to specialist support | Disabled people (80); family of a disabled person (44) | Measure of perceived access to support (*0.5) | 50% | (1) Unit cost of approved social worker (ASW) for community social care (€795 per person p.a) | € 123,757 | |
| | Improved partnership working | Partner organisations and network members (32) | Extent of influence on collaboration or cooperation with other individuals or organisations (Composite measure) | 75% | (12) dft estimation of business time savings (€3,197 per person p.a) | € 192,748 | |
| | Increased regional, national and international networking and collaboration | Partner organisations and network members (32) | Extent of influence on knowledge sharing and networking (Composite measure) | 81% | (15) Cost of a networking / training event and one hour of time devoted to networking at the average hourly earnings rate (€42 per person p.a) | € 60,103 | |
| Economic Wellbeing | Diversification of farm income; increased financial stability | Farmers (6) | Financial sustainability and diversification scale (Composite) | 69% | (5) Value of increased and safeguarded sales for agriculture and forestry through LEADER (AXIS 3) (€707 per farm p.a) | € 9,323 | 31% |
| | Enhanced level of management and relationship skills | Farmers (6); farm family members (18) | Management skills improvement scale (Composite) | 63% | (10) Cost of leadership management training course (€421 per person p.a) | € 15,995 | |





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|--------------------------------|---|---|--|-----|--|-----------|----|
| | Reduced farm operational costs | Farmers (6) | Change in operational costs measure | 62% | (20) Utility bill savings through increased resource efficiency (per farm business) (€67 per farm p.a) | € 628 | |
| | Increased business confidence | Farmers (6) | Business confidence scale | 72% | (23) Cost of self-esteem course (€128 per person p.a) | € 1,760 | |
| | Developed / skills competence and purpose through regular work | Disabled people (80) | Confidence measure (as a proxy for skills) | 88% | (9) Cost of employability skills training in regular sessions with counsellor / coach (€877 per person p.a) | € 196,637 | |
| | Reduced care costs | Family of a disabled person (44) | Care costs measure (*0.5) | 50% | (34) Cost of Local authority own-provision day care for adults requiring learning disability support (€8,564 per person p.a) | € 599,987 | |
| | Enhanced capacity for employment (increased household income) | Disabled people (80); family of a disabled person (44) | Change in household income measure (*0.5) | 50% | (22) Employment incentive costs (€2,103 per person p.a) | € 267,852 | |
| Social and Community Wellbeing | Increased respect and understanding of farmers in the community | Disabled person (80); family of a disabled person (44); therapists (16); partner organisations and network members (32) | Farmer Respect scale (Composite) | 19% | (8) Valuation for improved emotional well-being arising through the Common Assessment Framework (€390 per person p.a) | € 40,639 | 6% |
| | Increase sense of belonging within local community | Disabled people (80) Family of a | Measure of perceived sense of belonging | 03% | (4) Value to an individual (25-45) of feeling like they | € 14,354 | |





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|--|--|--|--|-----|--|---------------------------------------|-------------------|-------------|
| | | disabled person (44) | | | belong in their neighbourhood (€1,212 per person p.a) | | | |
| | More effective and targeted service delivery | Partner organisations and network members (32) | Extent of influence on delivery and targeting of services and social welfare (Composite measure) | 82% | (21) Average size of a charitable donation in the UK (€221 per person p.a) | € 14,568 | | |
| | Wider professional recognition of the care farming network | Partner organisations and network members (32) | Extent of influence on understanding and awareness of farmer and of care farm networks (Composite measure) | 89% | (15) Cost of a networking / training event and one hour of time devoted to networking at the average hourly earnings rate (€42 per person p.a) | € 83,721 | | |
| | More effective decision making at and between various levels | Partner organisations and network members (32) | Extent of influence on thinking, policy making and decision making in relation to agriculture and care farming (Composite measure) | 90% | (14) Cost estimate for Local Authorities of implementing proposed duty to promote local democracy (€25,607 per org. p.a) | € 57,898 | | |
| | | | | | | Total Benefits | €3,559,044 | 100% |
| | | | | | | Total Investment | €1,346,889 | |
| | | | | | | Benefit-Investment Ratio (BIR) | €2.64 : 1 | |

