SROI: Social Return on Investment

John Glazer and Megan Riddlebarger
Ohio University
Voinovich School of Leadership & Public Affairs
SEE: Social Enterprise Ecosystem

Bret Alphin
Development Director
Buckeye Hills Regional Council

April 17, 2018
Presentation Overview

- Social Return on Investment Methodology
- Buckeye Hills SROI Experience
- SROI Results-to-date
- Value to LDDs
Problem Statement

Enterprises, organizations, projects, programs, policies, etc. use resources to create and deliver social value, but there is no universal standard to measure and communicate success.

Solution: “Generally Accepted Impact Metrics”

If we can define, measure, and account for social value, we would change how:

- Decisions are made
- Resources are allocated
- Enterprises/organizations/programs/policies are managed
- We understand “investment”
Criteria for Effective Measurement of Value

- Relevant to Outcomes
- Helpful to Stakeholders
- Simple to Communicate
- Natural to Activities Involved
- Certain in Calculation
- Understood & Accepted
- Transparent & Well-Explained
- Founded on Evidence
Crowded Field: Approaches to Measuring Social Value

- **Cost-Benefit Analysis**
  - Also uses money as proxy of costs and benefits arising from investment, activity, or policy, but typically takes a macro perspective compared with SROI measuring value from the bottom up and designed as practical management tool.

- **Social Accounting**
  - While SROI starts with the expected/actual change resulting from activity, Social Accounting starts from an organization’s stated objectives, does not use financial proxies, and is not a ‘return ratio’.

- **Outcomes Approaches**
  - Common practice to measure outcomes as a part of a theory of change. SROI gives financial value to outcomes and relates them to stakeholder value.

- **Sustainability Reporting**
  - Lots in common with SROI, but SROI develops theories of change in relation to changes experienced by stakeholders and includes financial proxies for value of those impacts.

- **“True Cost” approach**
  - An economic analysis that tries to value and compare the costs/benefits of activities that are not reflected in the market prices paid, especially in environmental economics.

- **Environmental Impact Assessment**
  - Regulatory requirement assessing projects likely significant environmental effects.
Many Methods for Measuring Value

Source: Catalog of Approaches to Impact Measurement: Assessing Social Impact in Private Ventures by Olsen, Galimidi, Social Venture Technology Group and Rockefeller Foundation
Impact Value Chain

• **Inputs**
  • What is needed to make a program operational
    • Personnel, funding, intellectual property, volunteer hours

• **Outputs**
  • Clearly measurable units of activity
    • E.g. students tutored, patients treated, acres in conservancy, etc.

• **Outcomes**
  • Broader changes or benefits resulting from a program
    • (measured against its goals/objectives)

• **Impact**
  • Difference between what would have happened if a program did not exit and what happened as result of programmatic efforts

• **Value Created**
  • The hard thing to measure
SROI Deliverable:

\[
\text{SROI} = \text{VALUE OF BENEFITS} \quad \text{INVESTMENT}
\]

“Every $1 of investment generates $X social return.”

Source: MaRS Centre for Impact Investing
Financial and Social Returns

**ROI**
- **ROI** measures financial returns to private investors
  - Pro rata cash distribution to individuals’ share in enterprise value.
- **Return Ratio**: “Every $1 invested yields $X to investors”
- **Motivation**: maximize financial return, remain competitive, satisfy customers
- **Simple**: generally-accepted calculation, regulated, and standardized

**SROI**
- **SROI** measures the value of social returns to society as a whole
  - Accrual to society of costs avoided and/or benefits attained.
- **Return Ratio**: “Every $1 invested generated $X of social value to the community.”
- **Motivation**: maximize impact on intractable social challenges, be effective
- **Difficult**: no universal standards to measure value
Distinguishing SROI

Rating Systems
• Ranking-Based Data System
• Screening Function
  • “Pass Threshold”
  • Score Against Criteria
• Categorizes Outcomes

Assessment Systems
• Program Evaluations
• Measures Effectiveness
  • How Well Goals are Met
  • Evidence Changes Sought
• Counts Outcomes

Neither Rating nor Assessment Systems Measure/Quantify Impact. SROI’s asks whether the value of results is worth investment required.
EDA “Triple Bottom Line” and SROI

EDA’s Triple Bottom Line Tool
• Rates/Scores Alignment with Goals:
  • Economic Vitality
  • Environmental Stewardship
  • Community Well-Being
• Uses and Value:
  • Prioritize Strategic Alternatives
  • Communicate Goal Alignment: “Profit, Planet, & People”
• Limits
  • Does not measure whether investment is “worth it”
  • Actual results may not be commensurate with investment

SROI
• Measures Values Created
  • Quantify value of Impacts
  • Calculate Economic Value of Outcomes Achieved
  • Compare Value Created to Investment Required
• Uses and Value:
  • Measure of Investment Leverage
  • Communicate: “For every $1 invested, how much value created?”
• Limits
  • Available Research and Identification of “Fiscal Proxies”
  • Translating Values into Dollars
Social Return on Investment

**7 Principles**
1. Involve Stakeholders
2. Understand What Changes
3. Value the Things that Matter
4. Only Include what is Material
5. Do not Over-Claim
6. Be Transparent
7. Verify the Result

**6 Steps**
1. Establish Scope & Identify Stakeholders
2. Map Outcomes & Key Performance Indicators
3. Evidence Outcomes & Assign Value
4. Establish Impact
5. Calculate SROI
6. Report
SROI Essence: Financial Proxies for Social Value

- Social benefits have economic value
  - Methodology
    - Principles for assigning a dollar value to social, economic, and environmental outcomes
    - Data-driven, transparent, verifiable, documentable, credible
  - Key Measures
    - Cost Avoidance
    - Benefit Acquired

- SROI: relates impact to investment via Return Ratio
  “Every $1 of investment generates $X of value”
Assigning Value

• For each outcome or positive change, value is created

• Monetary Impacts – Clear Market Value
  • Money Generated and Money These have clear or inherent market values
    • E.g. how much more annual earnings with a high school diploma
    • E.g., wages earned, spending avoided

• Social value – No Clear Market Value
  • Proxy: a monetary stand-in for the social outcomes
    • Research Basis for Fiscal Proxies – Studies that show/measure the connection
      • Best-available research and information
      • Subject to revision/update
      • Transparent Assumptions and Calculations
“Discounting”

• Attribution
  • Extent of responsibility for the outcome
  • “But/For” – But for our intervention, the outcome would not happen

• Deadweight
  • Outcomes that would have happened anyway, regardless of the intervention

• Drop-off
  • Tendency of effects to lessen over time

• Displacement
  • Side effects that reduce/diminish impacts (e.g. jobs shifting rather than net new)
Case Study – Habitat for Humanity

• Social Values Created – The Story
• Financial Proxies – The Data

• Value of 0% Interest
• Wealth Creation via Home Equity
• Property Taxes and Property Values
• Lowered Housing Costs
• Avoided Subsidies

• Energy & Maintenance Savings
• Earning Potential via Education
• Community Volunteerism Value
• Local Money Flows
• Health & Well Being
• More…. 
## SROI: Interim Work Product: SE Ohio Habitat

### Benefits

<table>
<thead>
<tr>
<th>Benefits</th>
<th>Annual</th>
<th>To-Date</th>
<th>2016-2021</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fiscal Proxy</strong></td>
<td><strong>5 houses/yr</strong></td>
<td><strong>Through 2016</strong></td>
<td><strong>5 years forecast</strong></td>
</tr>
<tr>
<td>Interest &amp; Equity</td>
<td>$389,250</td>
<td>$6,383,700</td>
<td>$2,335,500</td>
</tr>
<tr>
<td>Property Tax</td>
<td>$6,000</td>
<td>$1,279,200</td>
<td>$1,951,200</td>
</tr>
<tr>
<td>Housing Savings</td>
<td>$22,000</td>
<td>$4,690,400</td>
<td>$4,844,400</td>
</tr>
<tr>
<td>Energy Savings</td>
<td>$5,355</td>
<td>$1,141,667</td>
<td>$1,179,151</td>
</tr>
<tr>
<td>Subsidy Savings</td>
<td>$35,000</td>
<td>$7,462,000</td>
<td>$7,707,000</td>
</tr>
<tr>
<td><strong>Education/Earnings</strong></td>
<td><strong>$3,334,536</strong></td>
<td><strong>$54,686,384</strong></td>
<td><strong>$74,693,597</strong></td>
</tr>
<tr>
<td>Community Engagement</td>
<td>$5,293</td>
<td>$2,256,722</td>
<td>$3,675,112</td>
</tr>
<tr>
<td>Local Money Flows</td>
<td>$646,886</td>
<td>$6,938,360</td>
<td>$9,130,239</td>
</tr>
<tr>
<td>Health</td>
<td>$2,566,813</td>
<td>$13,347,425</td>
<td>$15,914,238</td>
</tr>
<tr>
<td>Career Earnings</td>
<td>$3,300</td>
<td>$27,073</td>
<td>$36,973</td>
</tr>
<tr>
<td>ReStore C&amp;D Diversion</td>
<td>$12,000</td>
<td>$48,000</td>
<td>$108,000</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>$7,026,432</strong></td>
<td><strong>$98,260,931</strong></td>
<td><strong>$121,575,411</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fiscal Proxy</th>
<th>Annual</th>
<th>Through 2016</th>
<th>5 years forecast</th>
<th>Value</th>
<th>SROI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Capital</td>
<td>$687,179</td>
<td>$16,657,082</td>
<td>$20,512,351</td>
<td>$54,991,119</td>
<td>$9</td>
</tr>
<tr>
<td>Environmental Capital</td>
<td>$17,355</td>
<td>$1,189,667</td>
<td>$1,287,151</td>
<td>$3,958,500</td>
<td>$1</td>
</tr>
<tr>
<td>Health Capital</td>
<td>$2,566,813</td>
<td>$13,347,425</td>
<td>$15,914,238</td>
<td>$31,241,775</td>
<td>$5</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>$7,026,432</strong></td>
<td><strong>$98,260,931</strong></td>
<td><strong>$121,575,411</strong></td>
<td><strong>$193,528,991</strong></td>
<td><strong>$31</strong></td>
</tr>
</tbody>
</table>
Assurance and Credibility

• Best Practices
  • Principles
  • Methodology
  • Steps / Stages

• Assurance – Verification
  • Demonstration that the measures are accurate indicators of desired outcome.
  • Evidence-based support for proxies and calculations
  • Indicators need to be generally-accepted, widely-used, and validated.
  • Independent third-party validations are available

• Credibility:
  • Transparent
  • Data-driven
  • Verifiable
  • Documented
  • Tested

EDA  
Ohio University  
Regional Council
SROI Value Proposition:

**FOR:** For-profit social enterprises, non-profit entities, philanthropic organizations, impact investors, public programs, government institutions, and others who deploy resources to create social value

**WHO:** Need to measure the value of the impacts achieved by the results of their activities

**OUR:** Social Return on Investment Methodology

**IS A:** Data-driven valuation system

**THAT:** Measures the economic value of outcomes achieved compared with the investment needed to achieve them.

**UNLIKE:** Rating systems, certification programs, assessment methods, and other reporting frameworks that measure nonfinancial value

**OUR:** “Fiscal proxy” calculations of the economic value of social impact in terms of costs avoided and benefits attained

**DELIVERS:** A “return ratio” that measures how effectively investment is leveraged to achieve results

**AND:** Provides verifiable measures of the economic value of the social impact of outcomes achieved in order to inform investment decisions, guide strategic planning, and enable meaningful stakeholder communications.
• What is the value provided to the region that is EXCLUSIVELY added by your agency?

• The measures we are considering here are the ‘outcomes of your outcomes’ or ‘results of your results.’

• You’re understating the value you are providing.
### Today:

**Community Benefit Reporting**

<table>
<thead>
<tr>
<th>Category</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Projects</td>
<td>3 projects (CDBG WASHINGTON COUNTY)</td>
</tr>
<tr>
<td>Clients</td>
<td>6 clients (HOME CHOICE TRANSITIONS)</td>
</tr>
<tr>
<td>Projects</td>
<td>8 projects (CLEAN OHIO CONSERVATION FUND)</td>
</tr>
<tr>
<td>Clients</td>
<td>9 projects (APPALACHIAN PROJECTS)</td>
</tr>
<tr>
<td>Jobs</td>
<td>31 projects (SCIP/LTIP (Ohio Public Works))</td>
</tr>
<tr>
<td>Jobs</td>
<td>35 clients (CAREGIVER PROGRAM)</td>
</tr>
<tr>
<td>Jobs</td>
<td>50 jobs (JOBS RETAINED)</td>
</tr>
<tr>
<td>Clients</td>
<td>64 clients (PROJECT LIFE SAVER)</td>
</tr>
<tr>
<td>Clients</td>
<td>70 clients (ASSISTED LIVING WAIVER)</td>
</tr>
<tr>
<td>Jobs</td>
<td>98 jobs (JOBS CREATED)</td>
</tr>
<tr>
<td>Jobs</td>
<td>190 jobs (PEST CONTROL)</td>
</tr>
<tr>
<td>Hours</td>
<td>258 hours (LONG-TERM CARE OMBUDSMAN VOLUNTEER)</td>
</tr>
<tr>
<td>Units</td>
<td>762 units (EMERGENCY RESPONSE SYSTEM EQUIPMENT)</td>
</tr>
<tr>
<td>Hours</td>
<td>996 hours (LEGAL ASSISTANCE)</td>
</tr>
<tr>
<td>Assessments</td>
<td>1,255 Assessments (LONG-TERM CARE)</td>
</tr>
<tr>
<td>Hours</td>
<td>2,100 hours (MAPPING &amp; DATA SERVICES)</td>
</tr>
<tr>
<td>Days</td>
<td>2,572 days (ADULT DAY CARE)</td>
</tr>
<tr>
<td>Units</td>
<td>2,766 units (HOME MEDICAL EQUIPMENT)</td>
</tr>
<tr>
<td>Reviews</td>
<td>3,292 reviews (PRE-ADMISSION REVIEW SCREENING)</td>
</tr>
<tr>
<td>Screens</td>
<td>3,553 screens (INFORMATION &amp; REFERRAL CALLS)</td>
</tr>
<tr>
<td>Hours</td>
<td>27,950 hours (HOMEMAKER SERVICES)</td>
</tr>
<tr>
<td>Trips</td>
<td>22,359 trips (TRANSPORTATION)</td>
</tr>
<tr>
<td>Meals</td>
<td>47,593 meals (CONGREGATE MEALS)</td>
</tr>
<tr>
<td>Miles</td>
<td>49,060 miles (ADULT DAY CARE TRANSPORTATION)</td>
</tr>
<tr>
<td>Meals</td>
<td>249,701 meals (HOME-DELIVERED MEALS)</td>
</tr>
<tr>
<td>Hours</td>
<td>665,039 hours (PERSONAL CARE)</td>
</tr>
</tbody>
</table>
SROI = Value of Benefits Investment

SROI - a compliment to Benefit Reporting

SROI is different from traditional measures of activities and benefits:

- Return Ratio
- Attribution
- Communication opportunity
  - External
  - Internal
## Impact Snapshot

<table>
<thead>
<tr>
<th>Type of Capital</th>
<th>Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Capital</td>
<td>$30,826,070.00</td>
</tr>
<tr>
<td>Community Capital</td>
<td>$31,795,513.52</td>
</tr>
<tr>
<td>Environmental Capital</td>
<td>$113,479.68</td>
</tr>
<tr>
<td>Health Capital</td>
<td>$1,969,624.76</td>
</tr>
</tbody>
</table>
## Impact Calculations

<table>
<thead>
<tr>
<th>Category</th>
<th>Nature of Change</th>
<th>Outcome</th>
<th>Indicator</th>
<th>Quantity</th>
<th>Financial Proxy Value</th>
<th>Impact Calculation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type of Capital</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Beneficiary</strong></td>
<td><strong>Description</strong></td>
<td><strong>How to measure Change</strong></td>
<td><strong>How much change was there</strong></td>
<td><strong>Value of Change</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Financial Capital</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local Governments</td>
<td>Bond Fund Allocation for Road Improvement Projects</td>
<td>Value of Professional Services</td>
<td>800 hours</td>
<td></td>
<td>$26,070.00</td>
<td>$26,070.00</td>
</tr>
<tr>
<td>ARC</td>
<td>Grants Administration and Awards</td>
<td>Grantdollars deployed in the region</td>
<td>Stotal</td>
<td></td>
<td>$25,000,000.00</td>
<td>$25,000,000.00</td>
</tr>
<tr>
<td>EDA</td>
<td>Grants Administration and Awards</td>
<td>Grantdollars deployed in the region</td>
<td>Stotal</td>
<td></td>
<td>$5,800,000.00</td>
<td>$5,800,000.00</td>
</tr>
<tr>
<td><strong>Community Capital</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Community</td>
<td>Senior Volunteer hours</td>
<td>Value of volunteer labor</td>
<td>33250 hours</td>
<td></td>
<td>$802,655.00</td>
<td>$802,655.00</td>
</tr>
<tr>
<td><strong>Environmental Capital</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Municipality</td>
<td>Water &amp; Sewer Projects</td>
<td>Value of Professional Services</td>
<td>624 hours</td>
<td></td>
<td>$22,039.68</td>
<td>$22,039.68</td>
</tr>
<tr>
<td>County</td>
<td>Brownfields Reclamation Projects</td>
<td>Value of Professional Services</td>
<td>40 hours</td>
<td></td>
<td>$91,440.00</td>
<td>$91,440.00</td>
</tr>
<tr>
<td><strong>Health Capital</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Individuals</td>
<td>Access to fresh produce</td>
<td>Farmer Revenue and Consumer Discount</td>
<td>1525 Vouchers</td>
<td></td>
<td>$305,000.00</td>
<td>$305,000.00</td>
</tr>
<tr>
<td>Individuals</td>
<td>PASSPORT program</td>
<td>Service Coordination Assistance</td>
<td>1280 clients</td>
<td></td>
<td>$680,960.00</td>
<td>$680,960.00</td>
</tr>
<tr>
<td>Individuals</td>
<td>Transition to Community</td>
<td>Case Management Services</td>
<td>4200 patients</td>
<td></td>
<td>$547,470.00</td>
<td>$547,470.00</td>
</tr>
<tr>
<td>Individuals</td>
<td>Congregate Meals</td>
<td>Number of Participants</td>
<td>40,804 meals</td>
<td></td>
<td>$436,194.76</td>
<td>$436,194.76</td>
</tr>
</tbody>
</table>
PASSPORT program

Social Value Created: help seniors get the long-term services and supports they need to stay in their homes or other community settings, rather than enter nursing homes

Activities:
- Complete In-Person Assessment of level of care eligibility
- Case Management of enrolled individuals
- Oversite and coordination of services to address identified needs

Financial Value Created:
- 1:5 savings relative to cost of residential care
- Value of Professional Intervention
Deep Dive: Fiscal Proxy

### PASSPORT program

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Clients</td>
<td>1280</td>
</tr>
<tr>
<td>Average Cost of Residential Care Per Year</td>
<td>$60,000</td>
</tr>
<tr>
<td>Cost Savings due to Buckeye Hills Programming</td>
<td>80%</td>
</tr>
<tr>
<td>Value of Savings per Client</td>
<td>$48,000</td>
</tr>
<tr>
<td>Attribution</td>
<td>50%</td>
</tr>
</tbody>
</table>
Deep Dive: Fiscal Proxy Calculation

<table>
<thead>
<tr>
<th>PASSPORT program</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost Savings</td>
<td>$30,720,000.00</td>
</tr>
<tr>
<td>Professional Services</td>
<td>$680,960.00</td>
</tr>
<tr>
<td>Total Value</td>
<td>$62,120,960.00</td>
</tr>
</tbody>
</table>
# Impact Calculations

<table>
<thead>
<tr>
<th>Category</th>
<th>Nature of Change</th>
<th>Outcome Description</th>
<th>Indicator</th>
<th>Quantity</th>
<th>Financial Proxy Value</th>
<th>Quantity times Proxy Value minus Discounts</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Financial Capital</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local Governments</td>
<td>Bond Fund Allocation for Road Improvement Projects</td>
<td>Value of Professional Services</td>
<td>800 hours</td>
<td>$26,070.00</td>
<td>$26,070.00</td>
<td>$26,070.00</td>
</tr>
<tr>
<td>ARC</td>
<td>Grants Administration and Awards</td>
<td>Grantdollars deployed in the region</td>
<td>Stotal</td>
<td>$25,000,000.00</td>
<td>$25,000,000.00</td>
<td>$25,000,000.00</td>
</tr>
<tr>
<td>EDA</td>
<td>Grants Administration and Awards</td>
<td>Grantdollars deployed in the region</td>
<td>Stotal</td>
<td>$5,800,000.00</td>
<td>$5,800,000.00</td>
<td>$5,800,000.00</td>
</tr>
<tr>
<td><strong>Community Capital</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Community</td>
<td>Senior Volunteer hours</td>
<td>Value of volunteer labor</td>
<td>33250 hours</td>
<td>$802,655.00</td>
<td>$802,655.00</td>
<td>$802,655.00</td>
</tr>
<tr>
<td>Community</td>
<td>PASSPORT program</td>
<td>Cost savings of residential facility care</td>
<td>1280 clients</td>
<td>$61,440,000.00</td>
<td>$30,720,000.00</td>
<td>$30,720,000.00</td>
</tr>
<tr>
<td>Community</td>
<td>Evidence Based Training Program</td>
<td>Value of workshops provided</td>
<td>50 workshops</td>
<td>$42,384.00</td>
<td>$42,384.00</td>
<td>$42,384.00</td>
</tr>
<tr>
<td>Community</td>
<td>Information and Referrals Call Center</td>
<td>Community Members Access to Information</td>
<td>6588 calls</td>
<td>$230,474.52</td>
<td>$230,474.52</td>
<td>$230,474.52</td>
</tr>
<tr>
<td><strong>Environmental Capital</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Municipality</td>
<td>Water &amp; Sewer Projects</td>
<td>Value of Professional Services</td>
<td>624 hours</td>
<td>$22,039.68</td>
<td>$22,039.68</td>
<td>$22,039.68</td>
</tr>
<tr>
<td>County</td>
<td>Brownfields Reclamation Projects</td>
<td>Value of Professional Services</td>
<td>40 hours</td>
<td>$305,000.00</td>
<td>$305,000.00</td>
<td>$305,000.00</td>
</tr>
<tr>
<td><strong>Health Capital</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Individuals</td>
<td>Access to fresh produce</td>
<td>Farmer Revenue and Consumer Discount</td>
<td>1525 Vouchers</td>
<td>$305,000.00</td>
<td>$305,000.00</td>
<td>$305,000.00</td>
</tr>
<tr>
<td>Individuals</td>
<td>PASSPORT program</td>
<td>Service Coordination Assistance</td>
<td>1280 clients</td>
<td>$680,960.00</td>
<td>$680,960.00</td>
<td>$680,960.00</td>
</tr>
<tr>
<td>Individuals</td>
<td>Transition to Community</td>
<td>Case Management Services</td>
<td>4200 patients</td>
<td>$547,470.00</td>
<td>$547,470.00</td>
<td>$547,470.00</td>
</tr>
<tr>
<td>Individuals</td>
<td>Congregate Meals</td>
<td>Number of Participants</td>
<td>40,804 meals</td>
<td>$436,194.76</td>
<td>$436,194.76</td>
<td>$436,194.76</td>
</tr>
<tr>
<td>Program</td>
<td>Fiscal Proxy</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>------------------------------------</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Benefit Achieved</td>
<td>Cost Avoided</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>County CDBG, SCIP/LTIP, Home Choice, etc.</td>
<td>Market Value of Professional Services</td>
<td>Private Sector Consultant Fees</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PASSPORT</td>
<td>Professional Interventions to Assess, Refer and Coordinate Multiple Services</td>
<td>Cost of Residential Care</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meals - Congregate and Delivered</td>
<td>Individual Customization of Nutritional Programs</td>
<td>Cost of Meals</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ARC/EDA grants administration</td>
<td>Value of Investments and Value Created by Projects</td>
<td>(Varies by project)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Program Details**

- **3 projects**
  - County CDBG - Washington County
- **6 clients**
  - Home Choice Transitions
- **8 projects**
  - Clean Ohio Conservation Fund
- **9 projects**
  - Appalachian Projects
- **31 projects**
  - SCIP/LTIP (Ohio Public Works)
- **35 clients**
  - Caregiver Program
- **50 jobs**
  - Jobs Retained
- **64 clients**
  - Project Lifesaver
- **70 clients**
  - Assisted Living Waiver
- **98 jobs**
  - Jobs Created

**Fiscal Proxy Details**

- **190 jobs**
  - Pest Control
- **258 hours**
  - Long-Term Care Ombudsman Volunteer
- **3,292 reviews**
  - Pre-Admission Review Screening
- **3,553 screens**
  - Information & Referral Calls
- **762 units**
  - Emergency Response System Equipment
- **996 hours**
  - Legal Assistance
- **1,255 Assessments**
  - Long-Term Care
- **2,100 hours**
  - Mapping & Data Services
- **2,572 days**
  - Adult Day Care
- **2,766 units**
  - Home Medical Equipment
- **27,950 hours**
  - Homemaker Services
- **22,359 trips**
  - Transportation
- **47,593 meals**
  - Congregate Meals
- **49,060 miles**
  - Adult Day Care Transportation
- **269,701 meals**
  - Home-Delivered Meals
- **665,039 hours**
  - Personal Care

**Value of Investments and Value Created by Projects**

- ARC/EDA grants administration
Provisional SROI Return Ratio:

Given current assumptions,

Every $1 invested in Buckeye Hills Regional Council generates AT LEAST $13 of social value....

...... this number will increase!
SROI = COMMUNICATION
SROI: Social Return on Investment

John Glazer and Megan Riddlebarger
Ohio University
Voinovich School of Leadership & Public Affairs
SEE: Social Enterprise Ecosystem

Bret Alphin
Development Director
Buckeye Hills Regional Council

April 17, 2018