

Carers' Centres: What impact do they have?



The Princess Royal Trust
for Carers

Executive Summary



Investment of less than £5m across five Princess Royal Trust Carers' Centres in England resulted in an estimated social return at least £73m a year.

Background to this report

1.1 The Princess Royal Trust for Carers is a national charity which supports a UK-wide network of 144 independently-managed Carers' Centres, providing support to carers, including information, training, access to statutory services and benefits reviews. The Princess Royal Trust Carers' Centres also facilitate carer involvement in consultations and the development of new services. The Trust supports The Network of Carers' Centres by providing a national voice for carers and by helping centres to be as effective and sustainable as possible.

The Princess Royal Trust Carers' Centre services result in a real return to society, helping carers to continue to care confidently and safely. Carers provide support that is valued at £119bn¹ a year and so services that contribute to carers' ability to continue caring are vital to society's ability to manage the needs of its increasing elderly and disabled population.

1.2 The purpose of this report is to evaluate the benefits to key stakeholder groups of the key activities undertaken by five Princess Royal Trust Carers' Centres in:

- Harrogate
- Hertfordshire
- Lewisham
- Suffolk
- Westminster

1.3 The analysis is focused on four key areas of activity:

- Carer identification
- Advice, information-provision and practical support
- Learning and development
- Carer involvement

1.4 Carers face a number of challenges as a result of their caring role. Pre-existing medical conditions are likely to worsen. And, according to a study by the Social Policy Research Unit, carers are likely to experience emotional and mental health problems, as well as diminished immune response and susceptibility to physical illness and injury.²

¹ Research carried out by Carers UK and University of Leeds in 2011: www.carersuk.org/index.php?option=com_k2&view=item&id=2121&Itemid=8

² Hirst, M. (2004) *Hearts and Minds: the health effects of caring*. Social Policy Research Unit: York.

1.5 The report evaluates the improvement in outcomes for carers achieved by The Network, based on a detailed evaluation of five case studies considered by The Princess Royal Trust Carers' Centres to be typical of their caseloads. It uses life course analysis, demonstrating the impact of Carers' Centres' interventions for the beneficiary over a number of years as different life courses ensue. From a blend of different likely outcomes spanning the range of real life consequences that are found typically to arise, a weighted average social impact per carer (i.e. the average net gain to society from the life course analysis, weighted according to the proportion of carers that fall into each case study category) has been derived and used to extrapolate the benefits achieved by the five Carers' Centres in total. This has then been attributed to the areas of work listed above (1.3).

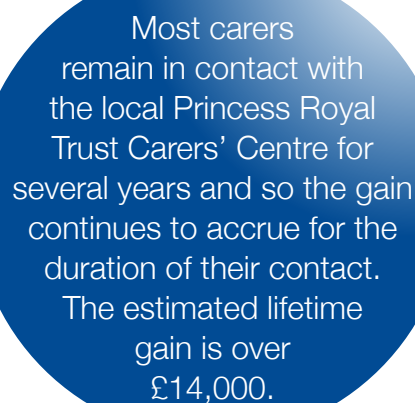
Overview of social return on investment (SROI)

1.6 Increasingly, organisations in the not-for-profit sector are developing an interest in measuring their social impact using SROI or alternative methodologies. This interest has arisen from a growing awareness within the sector of the potential benefits that an SROI assessment can have on providing further support for future financial commitments and an explanation of the "intangible" benefits that that support provides to a range of stakeholders. Organisations also need to meet the challenge of moving away from a "core" or grant funding-approach towards the project-based approach that is being adopted by central government.

1.7 Such shifts in central government thinking incline towards an approach that considers the value generated by a project compared to the cost of funding it. This is likely to be a key issue for local funders of organisations such as The Princess Royal Trust Carers' Centres, given that outcomes measurement would become compulsory under the proposed Public Services (Social Enterprise and Social Value) Bill, which appears to be strongly backed by all major political parties.

1.8 SROI follows the below process:

- Establish the scope of the evaluation, i.e. areas of coverage and person involvement. This may include identifying key stakeholders.
- Map outcomes based on feedback, i.e. how beneficiaries perceive any changes following intervention.
- Evidence outcomes, i.e. identify data to show whether outcomes have been achieved, as well as financial measures for these outcomes.
- Establish impact and eliminate the value that would have been achieved anyway, the value attributable to the work of others and the impact of any additional costs incurred in delivering the intervention.
- Calculate the SROI, then compare this result to the value of the investment. Whilst the published methodology concludes with a ratio of outcomes to inputs, we would caution against this, as it may lead to spurious comparison between very different organisations.



Most carers remain in contact with the local Princess Royal Trust Carers' Centre for several years and so the gain continues to accrue for the duration of their contact. The estimated lifetime gain is over £14,000.

→ Report, use and embed, i.e. share findings with stakeholders, embed the process of measurement and continue regular reevaluation and monitoring.

1.9 Representatives from The Princess Royal Trust for Carers, each of the five Princess Royal Trust Carers' Centres and Baker Tilly formed a project team and implemented action research methodology to gather and test data and assumptions.

1.10 The detailed SROI report includes³:


- An overview of social impact and other key methodologies used in this work.
- An analysis of the activities and outcomes of the above programmes and The Princess Royal Trust Carers' Centres.
- An overview of how those outcomes may be measured using financial proxies.
- An overview of the results of the evaluation.
- A detailed presentation of the models and assumptions used in the evaluation.

1.11 To the greatest extent possible, Baker Tilly has obtained evidence to support inputs and assumptions used in evaluation models. Where no evidence was available, the project team has used assumptions that they believe to be reasonable as inputs to the model. Baker Tilly has reviewed and challenged those assumptions during the course of the research. The Princess Royal Trust for Carers Trust and the Carers' Centre representatives have reviewed the content of this report and the models and have agreed that, to the best of their knowledge and belief, the assumptions used for the purposes of this report are accurate and/or reasonable.

Results of the evaluations

1.12 In this exercise, a small number of key assumptions have been identified upon which to base the evaluations. The project team has worked to develop a prudent result at a high level to ensure the outcome is defensible, is not overly complicated and does not risk overstatement.

1.13 The overall findings for the five centres in total for each of the areas of work listed at 1.2 are summarised in the following table.



The gain achieved is enhanced by an holistic service allowing easy transition between different elements.

³ A full copy of the report can be obtained by emailing jim.clifford@bakertilly.co.uk or info@carers.org.

Summary evaluation	Proportion of gains attributed – consensus across five Carers' Centres (%)	Benefits/gains due to each activity (£000)
Carer identification	14	10,926
Information and planning	38	27,314
Learning and development	13	9,105
Carer involvement (including the value of carer time)	10	7,427
Other services	13	9,105
Premium for holistic approach	13	9,105
Total*	100	72,982

*Does not equal to 100% due to rounding

1.14 This table shows a total gain of nearly £73m from four key areas of work by The Princess Royal Trust Carers' Centres and the proportion of that gain typically attributed to each area. It also shows the proportion of this gain attributed to other areas of work and the enhanced gain achieved by providing all of these services as part of an holistic approach.

1.15 The overall evaluated outcomes are shown net of appropriate deductions for key areas required in SROI analysis:

- Deadweight, i.e. gains that would have happened anyway.
- Alternative attribution, i.e. where part of the gain is more reasonably attributable to a partner or third party.
- Displacement, i.e. where the gain is tempered by a lesser dis-benefit.

The total has been attributed by the participants based on internal review and debate. The aspects of those operations to which the benefits are attributed are the four areas noted in 1.3 and "other" services not specifically noted in this report. The project team also noted that there was a noticeable premium achieved by providing a range of carers' services holistically in one location, allowing carers to progress between services as their circumstances change.

1.16 Based on the scope of this project and the specific areas of The Princess Royal Trust Carers' Centre activities and provision of services, the above table highlights that the areas of work evaluated in this report generate benefits of some £73m per annum.

1.17 Funding for The Princess Royal Trust Carers' Centres is subject to variation and the project team agreed that typical annual funding is likely to be represented most effectively by taking an average over the past five years. The five Carers' Centres had total average funding over the five years to 2009/10 of between £0.5m and £1.1m, with combined annual funding across the five centres of less than £5m.

1.18 On this basis, the annual impact of the benefits evaluated exceeds the total annual funding across the five Princess Royal Trust Carers' Centres evaluated by at least £68m.

1.19 In common with most SROI evaluations, it is not practicable or cost-effective to evaluate every aspect of the effects of the Carers' Centres. This often relates to the wider wellbeing and less proximate benefits of their work. Hence the above may not reflect full evaluations of benefits including:

- Personal satisfaction of carers and the people they care for.
- Improved social inclusion and economic activity of carers and the people they care for.
- The brand value of The Princess Royal Trust Carers' Centres.
- The value of skills development among carers.

1.20 Where specific evidence exists, the team sought to evaluate these benefits as noted in the report, for example personal satisfaction leading to an increase in economic activity. Many of these outcomes which could be considered as attributable to Carers' Centres were perceived, however, as either too remote or subject to uncertainties to be evaluated reliably, and have therefore not been included.

1.21 As this evaluation does not seek to measure the value of the further benefits listed at 1.20, the value of these outcomes would be incremental to the value shown above. Hence the evaluations shown above are lower than the full value of the outcomes potentially generated by the five Carers' Centres.

1.22 The team also noted that:

- A lifetime gain attributable to continuing contact over a number of years and phases of caring amounted to c. £14,279 per carer.
- The impact of early intervention is high, with much (60% or £8,567) of the gain being attributed to the initial work done by Carers' Centres to identify and assess the needs of a carer and ensure that adequate support is put in place.

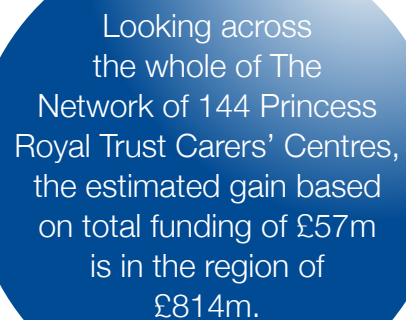
Assuming the relative size and numbers of the five centres are equally represented across The Network of 144 Princess Royal Trust Carers' Centres, it would seem justifiable to apply a similar analysis to all members. Those Carers' Centres involved and examined closely have easily demonstrated that gains of £73m derive from an investment of £5m (7% of the gain). On this basis, the £57m of funding received by The Network of 144 The Princess Royal Trust Carers' Centres suggests a gain to society of at least £814m across the UK ($£57m \div £814m = 7\%$).



It is estimated that 60% of the lifetime gain of £14,279 is achieved in the first year of contact.

Conclusions from the evaluations

- 1.23** In the words of New Philanthropy Capital in their 2010 positioning statement on SROI, it is an “incredibly useful tool”. This is apparent here as a significant financial value, based on sound and researched third party data, even with only part of the specifically funded project work being evaluated.
- 1.24** The totals of £73m per annum of economic and social gain set against around 7% of that in total funding for the five Carers’ Centres provide a fascinating insight into the wider social impact of improving outcomes for carers and the people they care for. They also draw the reader into wanting to know how it is done, i.e. what are The Princess Royal Trust Carers’ Centres doing to achieve so much?
- 1.25** That enquiry not only tells us more about its activities, but also highlights that this is only a partial evaluation of the wider gains from the work of Carers’ Centres. These wider gains, several of which New Philanthropy Capital describe as “social wellbeing”, are nonetheless of significant social value and should not be disregarded for not being attributed to financial measures in this study.
- 1.26** The methodology around SROI can become a process-driven exercise in which the answer emerges as a function of the process. It can also suffer from the use of financial proxies that have a poor correlation with the outcomes they attempt to measure, or are based on over enthusiastic assumptions and a lack of robustness in linking outcomes to the activities in which they originate. This is not the case here; the evaluations have been developed with real thought, care and prudence, and are based on validated underlying data, with conservative assumptions where such are necessary. It represents the very valuable contribution of The Princess Royal Trust Carers’ Centres to key stakeholders and to the wider economy in the areas evaluated fairly.



Looking across the whole of The Network of 144 Princess Royal Trust Carers’ Centres, the estimated gain based on total funding of £57m is in the region of £814m.

About the author

Jim Clifford is Head of Charity and Education Advisory Services and chairs the Public Sector Group at Baker Tilly. He was the lead author of the social impact protocol for Sector Skills Councils, published in 2010. He is undertaking research into evaluative protocols for transactional decision-making (linking social impact with conventional valuation and brand valuation) with Professors Palmer and Bruce at Cass Business School's Centre for Charity Effectiveness, where he is also a Visiting Fellow. He has recently been appointed as a Director of the Centre for Public Scrutiny.

Detailed briefing materials on social return on investment (SROI) can be obtained from Jim Clifford at jim.clifford@bakertilly.co.uk

Other published SROI reports by Baker Tilly can be obtained from the address below, including:

- PACT Domestic adoption and Fostering;
- Alana House Ministry of Justice funded Women's Centre
- North Lanarkshire Leisure

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