Project Scoring Matrix to Measure Social Return on Investment (SROI)

Mary Wendl, MSA
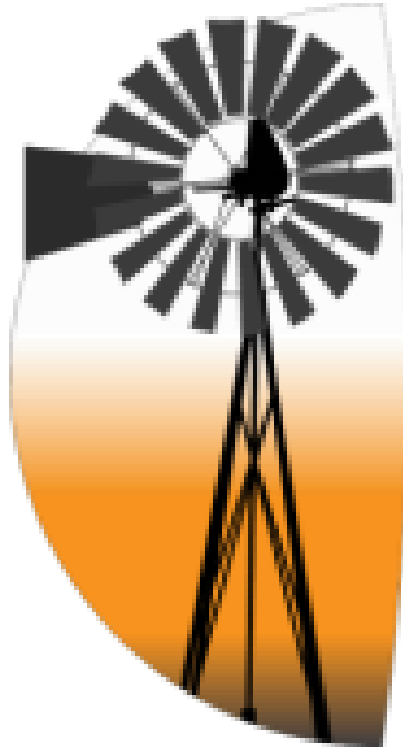Evaluation Coordinator

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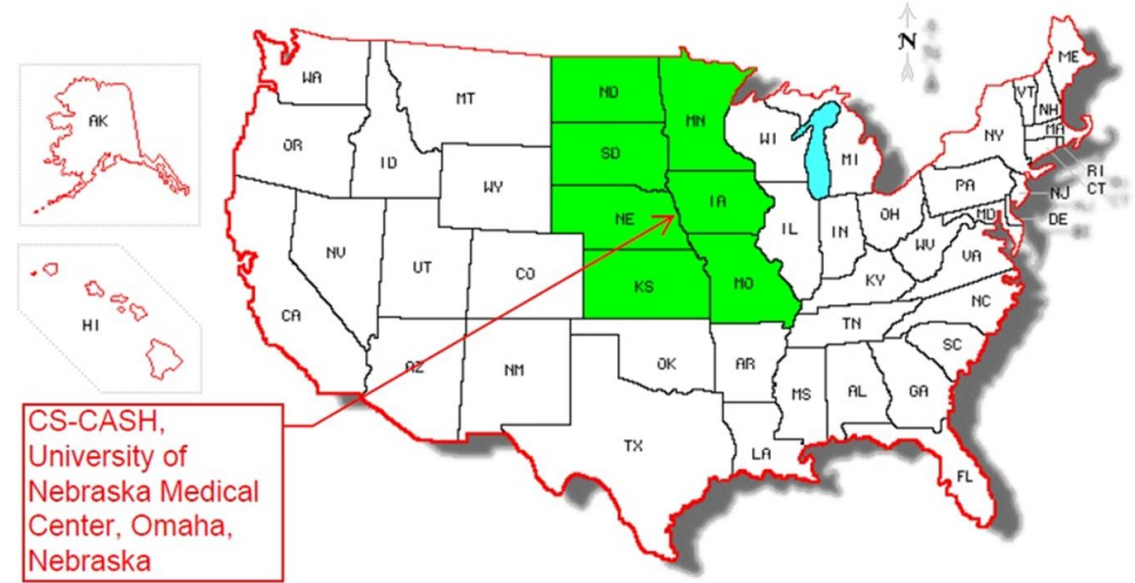American Evaluation Association 11/01/2018

CS-CASH Seven State Region

CS-CASH Organizational Chart

Central States Center for Agricultural Safety and Health
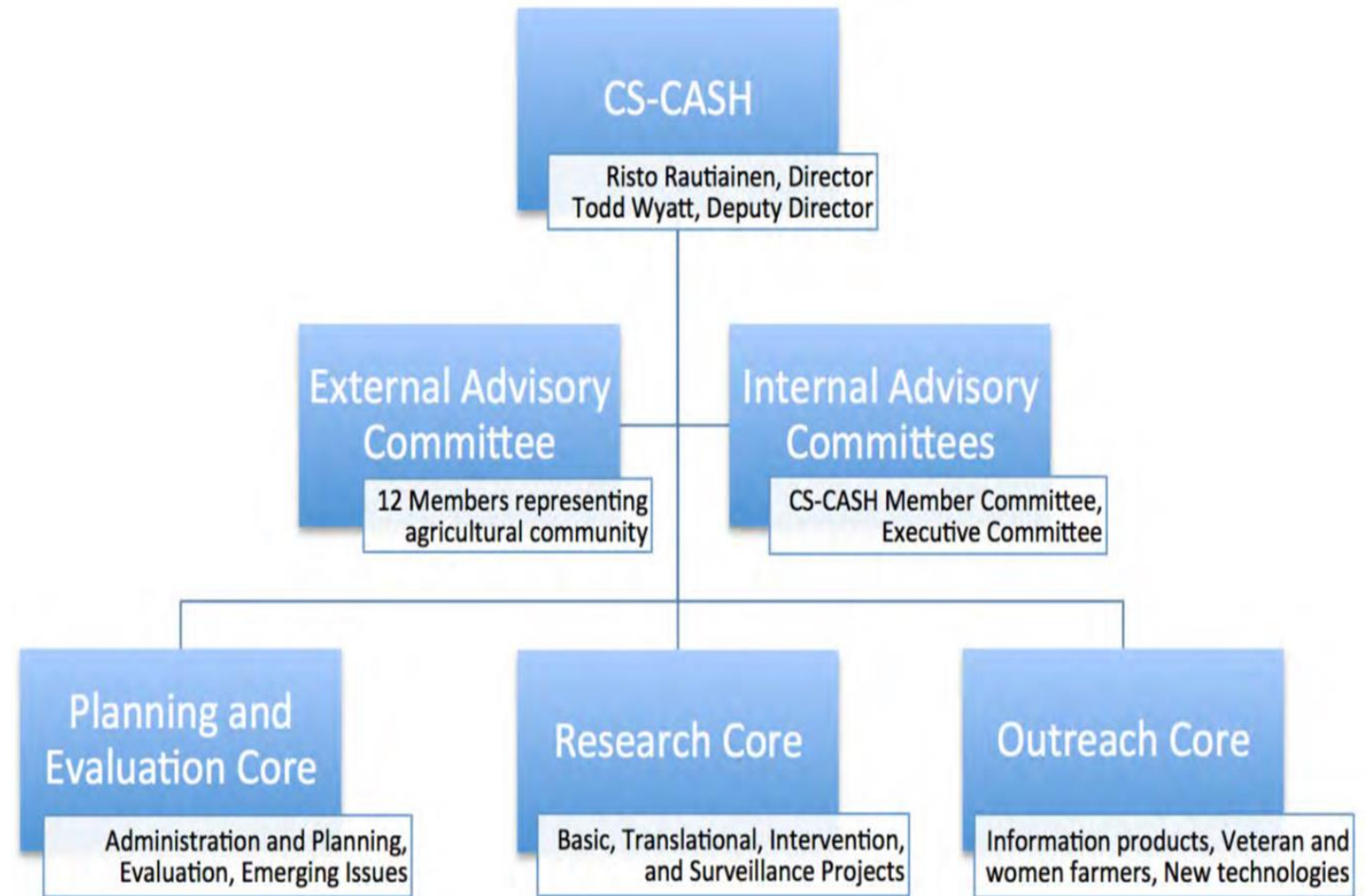
Evaluation Aims 1 and 2

Aim 1. Assess the effectiveness of CS-CASH leadership and governance.

- Internal Coalition Effectiveness (ICE) Instrument
- Field Visit Interviews

Aim 2. Conduct quality assurance by tracking CS CASH Logic Model Activities, Outputs, and Intermediate Outcomes.

- Social Network Analysis (SNA)
- Evaluation database tracking

Evaluation Aim 3

Evaluate CS CASH Logic Model End Outcomes for social and economic impacts.

- **Social Return on Investment (SROI) Approach**

CS CASH LOGIC MODEL

OUTPUTS

Activities

- Research
- Education
- Outreach

Products

- Publications
- Presentations
- Instruments
- Conferences
- ETC

INTERMEDIATE OUTCOMES

Stakeholders

- Health providers
- Policy makers
- Extension agencies
- Trade & Labor
- Researchers
- Rural leaders
- Technology and manufacturing

Take Action

- Best practices
- New policies
- New technology
- New curricula
- Increased research capacity

To Influence our End Users

- Ag workers
- Ag employers
- Ag operators
- Researchers
- Funding Agencies

END RESULTS

Social Benefits

- Safety
- Health
- Quality of Life

Economic Benefits

- Reduced health utilization

Center Sustainability

Social Return on Investment (SROI)

What it is

- Measures *broader socio-economic outcomes*
- Analyzes and computes views of multiple stakeholders in a singular monetary ratio
- Uses multiple sources of quantitative and qualitative data
- Allows "beneficiaries of funding to provide a realistic description and valuation of outcomes"

Banke-Thomas, A. O., Madaj, B., Charles, A., & van den Broek, N. (2015). Social Return on Investment (SROI) methodology to account for value for money of public health interventions: a systematic review. *BMC Public Health*, *15*, 582. http://doi.org/10.1186/s12889-015-1935-7

Social Return on Investment (SROI)

Benefits

- Captures benefits beyond traditional ROI analyses
- Builds a culture of accountability
- Promotes transparency for funders increasingly want to know their "value for the money invested"
- Ensures efficiency and better allocation of resources

Banke-Thomas, A. O., Madaj, B., Charles, A., & van den Broek, N. (2015). Social Return on Investment (SROI) methodology to account for value for money of public health interventions: a systematic review. *BMC Public Health*, *15*, 582. http://doi.org/10.1186/s12889-015-1935-7

WHAT IS PROJECT SCORING

1st step in SROI

Customized "Scorecard"
- Metrics from LM
- Weighted values to metrics
- Annual "score keeping"
- At end of 9-10 yrs, we will monetize some metrics, and establish the "social value" of our metrics that cannot be monetized

PROJECT SCORING

HOW IT WORKS

1. Center members vote on the weight of each metric
2. Weights are finalized
   a. Brings shared understanding
   b. Considers "outside" factors
3. Criteria for each metric are established
   a. EXAMPLE
   - Publications = 5 (very important)
   - Criteria: A (2 pts) = 10% increase
           C (1 pt) = no increase
           D (-1) = decrease

WHY ROI ANALYSIS FOR CS-CASH?

- Tradeoff between cost and benefits increasingly important for certain funders

- Return on investment (ROI) compares the monetary value of benefits with associated costs

- ROI is narrowly tailored based on particular perspective of funder or organization

AgHealth
Central States
Center for Agricultural
Safety and Health

Phase 1: PROJECT SCORING

What we Value	What we view as Priorities	How we Focus Evaluation	SROI
• Multiple outcomes that may have differing levels of value • Require input from our Executive Council	• Based on scores • Helps direct focus and prioritize	• Focuses data collection on most essential metrics • Provides basis for SROI	• Attaching monetary "value" to our outcomes

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VOTING ON WEIGHTS FOR PROJECT SCORING

- **Network Project Scoring** - [CS-CASH Scoring Matrix Survey-Network](#)

- **4 & 5 Year Funded and Pilots Project Scoring** - [CS-CASH Scoring Matrix Survey-Projects](#)

- Please

  - Vote on weights for each metric

  - What, if anything, is missing?

Data Sources

Field Visit Interviews

Surveys

Website and Facebook Hits

Reports

Meeting Minutes

Database

Surveys Employed

Internal Coalition Effectiveness

Poll Everywhere

Social Network Analysis

Customer Service Satisfaction

Evaluation Database

Outcomes Criteria	Weight	Rating				FY 7 DATA	FY7 SCORE
1: Governance		3	2	1	0		
1. 1. Administrative Core meets Center Aims effectively	4.5	*Highly Effective* ICE Score 6.0-7.0	*Mostly Effective* ICE Score 4.5 – 5.9	*Somewhat Effective* ICE Score of 3.8 - 4.4	*Ineffective* ICE Score Below 3.8	M = 6.52	13.5
2. Quality Assurance: Tracking on LM Outputs & Intermediate Outcomes		*Highly satisfactory progression* 100% of PIs on track with program expectations for timeline and Scholarship	*Mostly satisfactory progression* 75% on track with program expectations for timeline and Scholarship	*Somewhat satisfactory progression* 50% on track with program expectations for timeline and Scholarship	*Unsatisfactory progression* 25% on track with program expectations for timeline and Scholarship	14 projects No delays reported in RPPR F2	15
TOTAL SCORE							

PROJECT SCORING MATRIX FOR THE NETWORK

RANGE	Weight	Rating				FY 7 DATA	FY 7 SCORE
1.Productivity		3	2	1	-1		
1.1.Peer-reviewed publications	5	*Highly productive* 100% of PIs are authors/co-author on 1 or more peer-reviewed publications.	*Mostly productive* 75% of PIs are author/coauthor on at least 1 peer-reviewed publication.	*Somewhat productive* 50% of PIs are author/co-author on at least 1 peer-reviewed publication.	*Not very productive* < 25% of PIs are author/co-author on at least 1 peer-reviewed publication.	7/8 or 88%	10
2.Collaboration		3	2	1	-1		
2.1 CBPR Partnerships	4.5	*Highly engaged* SNA METRICS • Total contacts • Density • Role diversity	*Mostly engaged* SNA METRICS • Total contacts • Density Role diversity	*Somewhat engaged* SNA METRICS • Total contacts • Density Role diversity	*Not very engaged* SNA METRICS • Total contacts • Density • Role diversity	X out of 22 PI's have CBPR	Subjective baseline score
FOUR/ FIVE YEAR AND All PILOT PROJECTS SAMPLE					Total Score		

NEXT STEPS

- Baseline scoring matrix report at member meeting November, 2018

- Evaluation team collects network and project data for matrix score with annual comparison denoting quality improvement

- Health Economist selects parts of the matrix to prepare a SROI for renewed funding application by December 2020